



Lee County Board of County Commissioners
Department of Community Development
Division of Planning
Post Office Box 398
Fort Myers, FL 33902-0398
Telephone: (239) 533-8585
FAX: (239) 485-8344

APPLICATION FOR A
COMPREHENSIVE PLAN AMENDMENT

RECEIVED
APR 17 2014

(To be completed at time of intake)

DATE REC'D: _____

REC'D BY: _____

COMMUNITY DEVELOPMENT

APPLICATION FEE: _____

TIDEMARK NO: _____

THE FOLLOWING VERIFIED:

Zoning []

Commissioner District []

Designation on FLUM []

(To be completed by Planning Staff)

Plan Amendment Cycle: [] Normal [X] Small Scale [] DRI [] Emergency

Request No: _____

APPLICANT - PLEASE NOTE:

Answer all questions completely and accurately. Please print or type responses. If additional space is needed, number and attach additional sheets. The total number of sheets in your application is: _____

Submit 6 copies of the complete application and amendment support documentation, including maps, to the Lee County Division of Planning. Up to 90 additional copies will be required for Local Planning Agency, Board of County Commissioners hearings and the Department of Community Affairs' packages. Staff will notify the applicant prior to each hearing or mail out.

I, the undersigned owner or authorized representative, hereby submit this application and the attached amendment support documentation. The information and documents provided are complete and accurate to the best of my knowledge.

[Signature]
Signature of Owner or Authorized Representative

12-20-13
Date

Laura DeJohn, AICP
Printed Name of Owner or Authorized Representative

I. APPLICANT/AGENT/OWNER INFORMATION

Applicant: Focus Development Group, LLC c/o Jeffery A. Graef, Managing Member
Address: 3960 Airport Road, Suite 9
City, State, Zip: Boca Raton, Florida
Phone Number: (561) 755-7170 Fax Number: (561) 948-2100
Email: jgraef@focusdevelopmentgroup.com

Agent*: Steven C. Hartsell, Esq.
Address: PO Drawer 1507
City, State, Zip: Fort Myers, Florida 33902
Phone Number: (239) 336-6244 Fax Number: _____
Email: stevehartsell@paveselaw.com

Owner(s) of Record: Appalachian Oil Company
Address: 12734 Kenwood Lane, Suite 35
City, State, Zip: Fort Myers, Florida 33907
Phone Number: (239) 278-5900 Fax Number: (239) 278-3179
Email: _____

Name, address and qualification of additional planners, architects, engineers, environmental consultants, and other professionals providing information contained in this application.

Laura DeJohn, AICP. Johnson Engineering, Inc. 2122 Johnson Street, Fort Myers, FL. 33901 239-334-0046. ldejohn@johnsoneng.com

Ted B Treesh. TR Transportation Consultants, Inc. 2726 Oak Ridge Ct. Suite 503, Fort Myers, FL 33901. 239-292-6746. tbt@trtrans.net

* This will be the person contacted for all business relative to the application.

II. REQUESTED CHANGE (Please see Item 1 for Fee Schedule)

A. TYPE: (Check appropriate type)

Text Amendment

Future Land Use Map Series Amendment
(Maps 1 thru 24)

List Number(s) of Map(s) to be amended:

Map 1

1. Future Land Use Map amendments require the submittal of a complete list, map, and two sets of mailing labels of all property owners and their mailing addresses, for all

property within 500 feet of the perimeter of the subject parcel. An additional set of mailing labels is required if your request includes a change to the Future Land Use Map (Map 1, page 1). The list and mailing labels may be obtained from the Property Appraisers office. The map must reference by number or other symbol the names of the surrounding property owners list. The applicant is responsible for the accuracy of the list and map.

At least 15 days before the Local Planning Agency (LPA) hearing, the applicant will be responsible for posting signs on the subject property, supplied by the Division of Planning, indicating the action requested, the date of the LPA hearing, and the case number. An affidavit of compliance with the posting requirements must be submitted to the Division of Planning prior to the LPA hearing. The signs must be maintained until after the final Board adoption hearing when a final decision is rendered.

B. SUMMARY OF REQUEST (Brief explanation):

The Applicant seeks to change the Subject Parcel's designation on the Future Land Use Map from General Interchange to Intensive Development, and to amend Table 1(b) accordingly, in order to allow for 136 multifamily dwelling units with a density of 15.87 dwelling units per acre.

III. PROPERTY SIZE AND LOCATION OF AFFECTED PROPERTY (for amendments affecting development potential of property)

A. Property Location:

1. Site Address: 10471 Corkscrew Commons Drive, Estero, FL 33928

2. STRAP(s): 35-46-25-30-00000.0020

B. Property Information:

Total Acreage of Property: 8.57

Total Acreage included in Request: 8.57

Total Uplands: 8.57

Total Wetlands: 0

Current Zoning: CPD

Current Future Land Use Designation: General Interchange

Area of each Existing Future Land Use Category: 8.57 acres

Existing Land Use: Vacant

C. State if the subject property is located in one of the following areas and if so how does the proposed change affect the area:

Lehigh Acres Commercial Overlay: N/A

Airport Noise Zone 2 or 3: N/A

Acquisition Area: N/A

Joint Planning Agreement Area (adjoining other jurisdictional lands): N/A

Community Redevelopment Area: N/A

D. Proposed change for the subject property:

Proposed change to Intensive Development Future Land Use designation.

E. Potential development of the subject property:

1. Calculation of maximum allowable development under existing FLUM:

Residential Units/Density	N/A
Commercial intensity	Development Order approved for 60,211 s.f. of retail and 7,454 s.f. of restaurant.
Industrial intensity	N/A

2. Calculation of maximum allowable development under proposed FLUM:

Residential Units/Density	119 units at 14 du/acre, 188 units at 22 du/acre with bonus density
Commercial intensity	Development Order approved for 60,211 s.f. of retail and 7,454 s.f. of restaurant.
Industrial intensity	N/A

IV. AMENDMENT SUPPORT DOCUMENTATION

At a minimum, the application shall include the following support data and analysis. These items are based on comprehensive plan amendment submittal requirements of the State of Florida, Department of Community Affairs, and policies contained in the Lee County Comprehensive Plan. Support documentation provided by the applicant will be used by staff as a basis for evaluating this request. To assist in the preparation of amendment packets, the applicant is encouraged to provide all data and analysis electronically. (Please contact the Division of Planning for currently accepted formats.)

A. General Information and Maps

NOTE: For each map submitted, the applicant will be required to provide a reduced map (8.5" x 11") for inclusion in public hearing packets.

The following pertains to all proposed amendments that will affect the development potential of properties (unless otherwise specified).

1. Provide any proposed text changes.
2. Provide a current Future Land Use Map at an appropriate scale showing the boundaries of the subject property, surrounding street network, surrounding designated future land uses, and natural resources.
3. Provide a proposed Future Land Use Map at an appropriate scale showing the boundaries of the subject property, surrounding street network, surrounding designated future land uses, and natural resources.
4. Map and describe existing land uses (not designations) of the subject property and surrounding properties. Description should discuss consistency of current uses with the proposed changes.

5. Map and describe existing zoning of the subject property and surrounding properties.
6. The certified legal description(s) and certified sketch of the description for the property subject to the requested change. A metes and bounds legal description must be submitted specifically describing the entire perimeter boundary of the property with accurate bearings and distances for every line. The sketch must be tied to the state plane coordinate system for the Florida West Zone (North America Datum of 1983/1990 Adjustment) with two coordinates, one coordinate being the point of beginning and the other an opposing corner. If the subject property contains wetlands or the proposed amendment includes more than one land use category a metes and bounds legal description, as described above, must be submitted in addition to the perimeter boundary of the property for each wetland or future land use category.
7. A copy of the deed(s) for the property subject to the requested change.
8. An aerial map showing the subject property and surrounding properties.
9. If applicant is not the owner, a letter from the owner of the property authorizing the applicant to represent the owner.

B. Public Facilities Impacts

NOTE: The applicant must calculate public facilities impacts based on a maximum development scenario (see Part II.H.).

1. Traffic Circulation Analysis

The analysis is intended to determine the effect of the land use change on the Financially Feasible Transportation Plan/Map 3A (20-year horizon) and on the Capital Improvements Element (5-year horizon). Toward that end, an applicant must submit the following information:

Long Range – 20-year Horizon:

- a. Working with Planning Division staff, identify the traffic analysis zone (TAZ) or zones that the subject property is in and the socio-economic data forecasts for that zone or zones;
- b. Determine whether the requested change requires a modification to the socio-economic data forecasts for the host zone or zones. The land uses for the proposed change should be expressed in the same format as the socio-economic forecasts (number of units by type/number of employees by type/etc.);
- c. If no modification of the forecasts is required, then no further analysis for the long range horizon is necessary. If modification is required, make the change and provide to Planning Division staff, for forwarding to DOT staff. DOT staff will rerun the FSUTMS model on the current adopted Financially Feasible Plan network and determine whether network modifications are necessary, based on a review of projected roadway conditions within a 3-mile radius of the site;
- d. If no modifications to the network are required, then no further analysis for the long range horizon is necessary. If modifications are necessary, DOT staff will determine the scope and cost of those modifications and the effect on the financial feasibility of the plan;
- e. An inability to accommodate the necessary modifications within the financially feasible limits of the plan will be a basis for denial of the requested land use change;

- f. If the proposal is based on a specific development plan, then the site plan should indicate how facilities from the current adopted Financially Feasible Plan and/or the Official Trafficways Map will be accommodated.

Short Range – 5-year CIP horizon:

- a. Besides the 20-year analysis, for those plan amendment proposals that include a specific and immediate development plan, identify the existing roadways serving the site and within a 3-mile radius (indicate laneage, functional classification, current LOS, and LOS standard);
 - b. Identify the major road improvements within the 3-mile study area funded through the construction phase in adopted CIP's (County or Cities) and the State's adopted Five-Year Work Program;
Projected 2030 LOS under proposed designation (calculate anticipated number of trips and distribution on roadway network, and identify resulting changes to the projected LOS);
 - c. For the five-year horizon, identify the projected roadway conditions (volumes and levels of service) on the roads within the 3-mile study area with the programmed improvements in place, with and without the proposed development project. A methodology meeting with DOT staff prior to submittal is required to reach agreement on the projection methodology;
 - d. Identify the additional improvements needed on the network beyond those programmed in the five-year horizon due to the development proposal.
2. Provide an existing and future conditions analysis for (see Policy 95.1.3):
- a. Sanitary Sewer
 - b. Potable Water
 - c. Surface Water/Drainage Basins
 - d. Parks, Recreation, and Open Space
 - e. Public Schools.

Analysis should include (but is not limited to) the following (see the Lee County Concurrency Management Report):

- Franchise Area, Basin, or District in which the property is located;
- Current LOS, and LOS standard of facilities serving the site;
- Projected 2030 LOS under existing designation;
- Projected 2030 LOS under proposed designation;
- Existing infrastructure, if any, in the immediate area with the potential to serve the subject property.
- Improvements/expansions currently programmed in 5 year CIP, 6-10 year CIP, and long range improvements; and
- Anticipated revisions to the Community Facilities and Services Element and/or Capital Improvements Element (state if these revisions are included in this amendment).
- Provide a letter of service availability from the appropriate utility for sanitary sewer and potable water.

In addition to the above analysis for Potable Water:

- Determine the availability of water supply within the franchise area using the current water use allocation (Consumptive Use Permit) based on the annual average daily withdrawal rate.
- Include the current demand and the projected demand under the existing designation, and the projected demand under the proposed designation.

- Include the availability of treatment facilities and transmission lines for reclaimed water for irrigation.
 - Include any other water conservation measures that will be applied to the site (see Goal 54).
3. Provide a letter from the appropriate agency determining the adequacy/provision of existing/proposed support facilities, including:
 - a. Fire protection with adequate response times;
 - b. Emergency medical service (EMS) provisions;
 - c. Law enforcement;
 - d. Solid Waste;
 - e. Mass Transit; and
 - f. Schools.

In reference to above, the applicant should supply the responding agency with the information from Section's II and III for their evaluation. This application should include the applicant's correspondence to the responding agency.

C. Environmental Impacts

Provide an overall analysis of the character of the subject property and surrounding properties, and assess the site's suitability for the proposed use upon the following:

1. A map of the Plant Communities as defined by the Florida Land Use Cover and Classification system (FLUCCS).
2. A map and description of the soils found on the property (identify the source of the information).
3. A topographic map depicting the property boundaries and 100-year flood prone areas indicated (as identified by FEMA).
4. A map delineating the property boundaries on the Flood Insurance Rate Map effective August 2008.
5. A map delineating wetlands, aquifer recharge areas, and rare & unique uplands.
6. A table of plant communities by FLUCCS with the potential to contain species (plant and animal) listed by federal, state or local agencies as endangered, threatened or species of special concern. The table must include the listed species by FLUCCS and the species status (same as FLUCCS map).

D. Impacts on Historic Resources

List all historic resources (including structure, districts, and/or archeologically sensitive areas) and provide an analysis of the proposed change's impact on these resources. The following should be included with the analysis:

1. A map of any historic districts and/or sites, listed on the Florida Master Site File, which are located on the subject property or adjacent properties.
2. A map showing the subject property location on the archeological sensitivity map for Lee County.

E. Internal Consistency with the Lee Plan

1. Discuss how the proposal affects established Lee County population projections, Table 1(b) (Planning Community Year 2030 Allocations), and the total population capacity of the Lee Plan Future Land Use Map.
 2. List all goals and objectives of the Lee Plan that are affected by the proposed amendment. This analysis should include an evaluation of all relevant policies under each goal and objective.
 3. Describe how the proposal affects adjacent local governments and their comprehensive plans.
 4. List State Policy Plan and Regional Policy Plan goals and policies which are relevant to this plan amendment.
- F. Additional Requirements for Specific Future Land Use Amendments
1. Requests involving Industrial and/or categories targeted by the Lee Plan as employment centers (to or from)
 - a. State whether the site is accessible to arterial roadways, rail lines, and cargo airport terminals,
 - b. Provide data and analysis required by Policy 2.4.4,
 - c. The affect of the proposed change on county's industrial employment goal specifically policy 7.1.4.
 2. Requests moving lands from a Non-Urban Area to a Future Urban Area
 - a. Demonstrate why the proposed change does not constitute Urban Sprawl. Indicators of sprawl may include, but are not limited to: low-intensity, low-density, or single-use development; 'leap-frog' type development; radial, strip, isolated or ribbon pattern type development; a failure to protect or conserve natural resources or agricultural land; limited accessibility; the loss of large amounts of functional open space; and the installation of costly and duplicative infrastructure when opportunities for infill and redevelopment exist.
 3. Requests involving lands in critical areas for future water supply must be evaluated based on policy 2.4.2.
 4. Requests moving lands from Density Reduction/Groundwater Resource must fully address Policy 2.4.3 of the Lee Plan Future Land Use Element.
- G. Justify the proposed amendment based upon sound planning principles. Be sure to support all conclusions made in this justification with adequate data and analysis.

Item 1: Fee Schedule

Map Amendment Flat Fee	\$2,000.00 each
Map Amendment > 20 Acres	\$2,000.00 and \$20.00 per 10 acres
Small Scale Amendment (10 acres or less)	\$1,500.00 each
Text Amendment Flat Fee	\$2,500.00 each

AFFIDAVIT

I, Jeffrey A. Graef, Managing Member, certify that I am the owner or authorized representative of the property described herein, and that all answers to the questions in this application and any sketches, data, or other supplementary matter attached to and made a part of this application, are honest and true to the best of my knowledge and belief. I also authorize the staff of Lee County Community Development to enter upon the property during normal working hours for the purpose of investigating and evaluating the request made through this application.

FOCUS DEVELOPMENT GROUP, LLC

Signature of Applicant

12/16/13
Date

Jeffrey A. Graef, Managing Member
Printed Name of Applicant

STATE OF
COUNTY OF

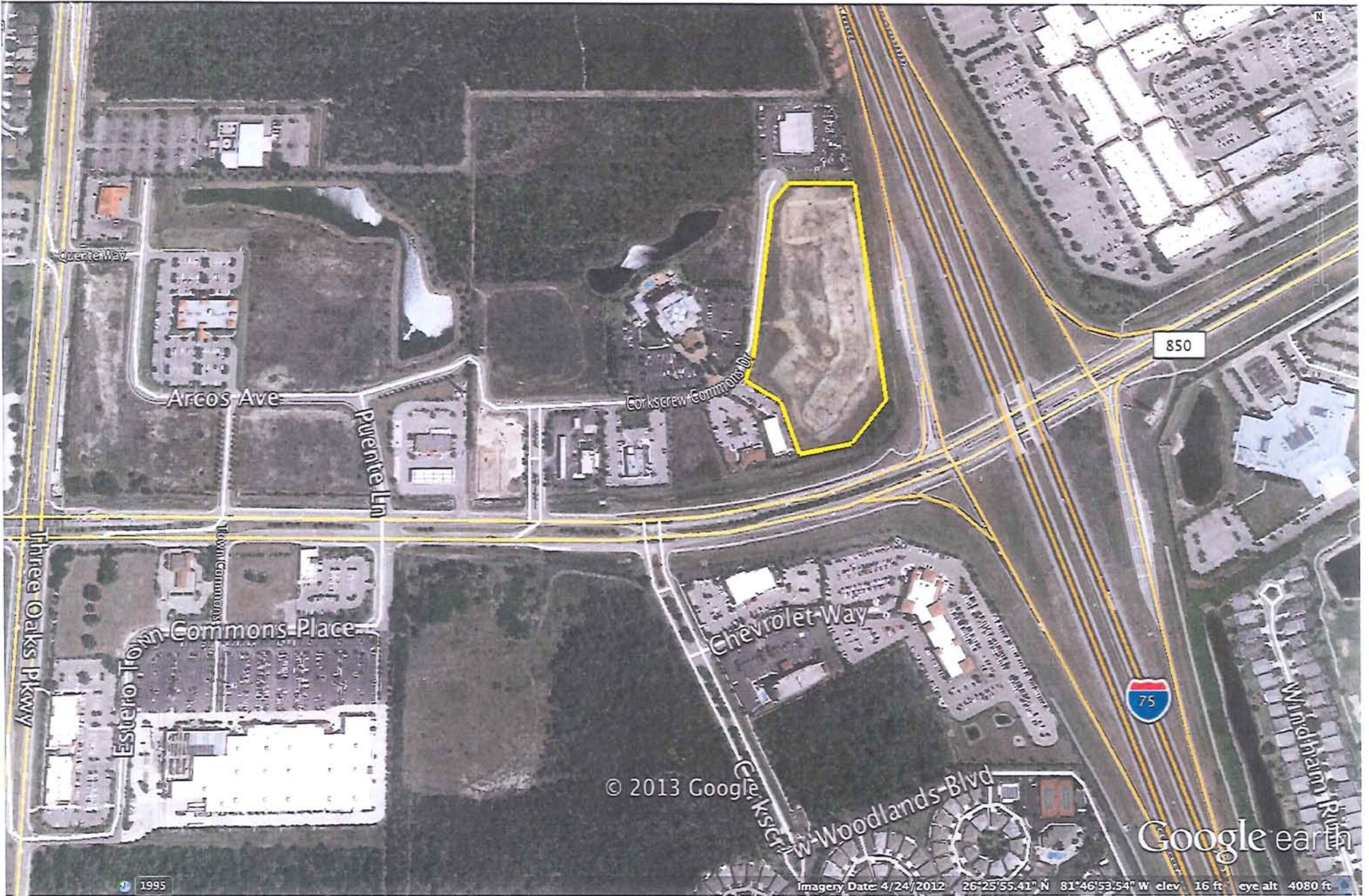
The foregoing instrument was sworn to (or affirmed) and subscribed before me on 12/16/13 (date) by Jeffrey A. Graef (name of person providing oath or affirmation), who is personally known to me or who has produced _____ (type of identification) as identification.

Signature of Notary Public

(Name typed, printed or stamped)



ERIC L. GLAZER
MY COMMISSION # EE 007011
EXPIRES: November 7, 2014
Bonded Thru Budget Notary Services



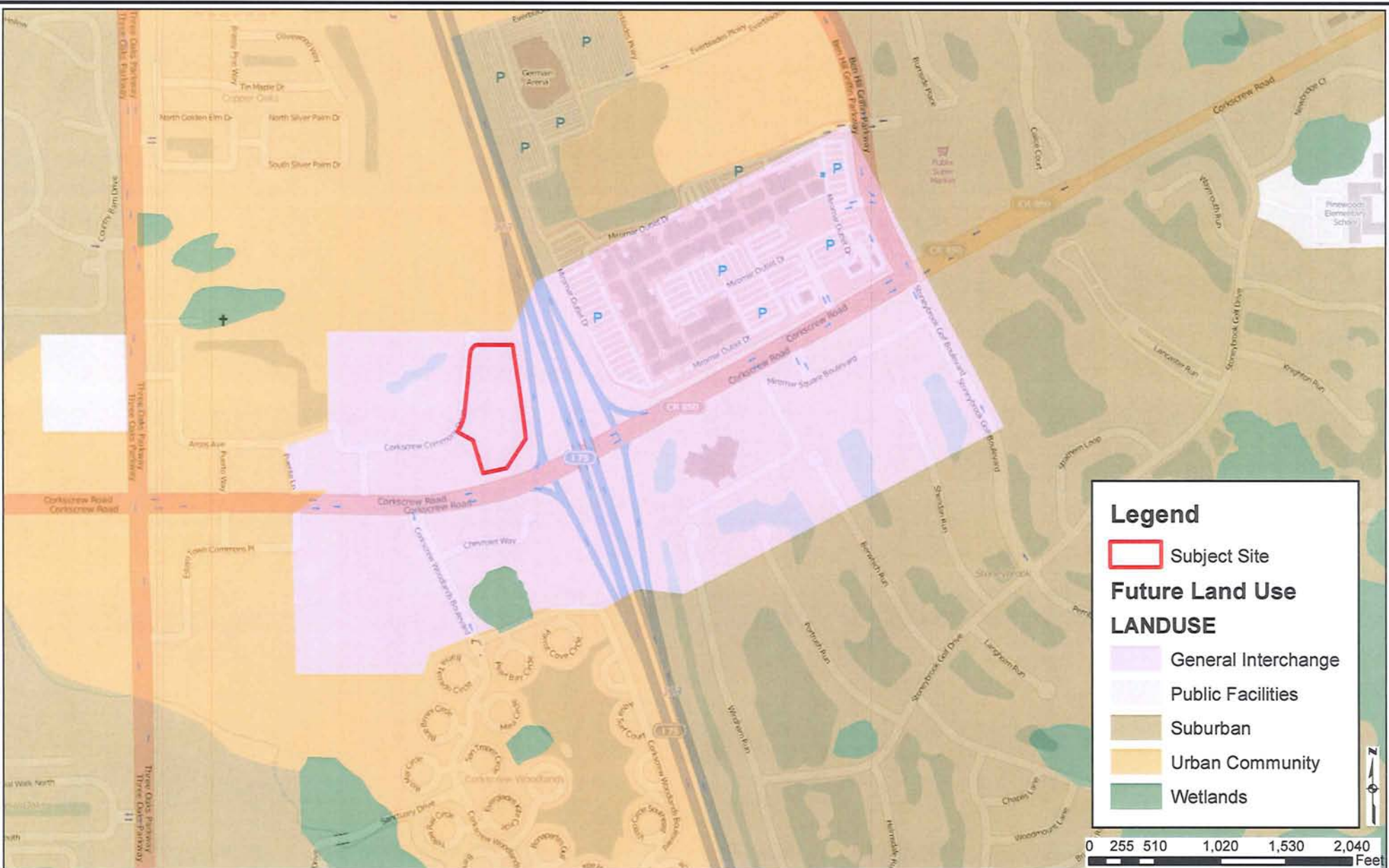
© 2013 Google

Google earth

1995

Imagery Date: 4/24/2012 26°25'55.41" N 81°46'53.54" W elev. 16 ft eye alt. 4080 ft

L:\20130000\20139560-000 - Focus Development Group (Estero Apartments)\Permitting\Comp Plan Amendment\Existing FLUM.mxd



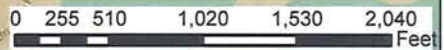
Legend

- Subject Site

Future Land Use

LANDUSE

- General Interchange
- Public Facilities
- Suburban
- Urban Community
- Wetlands



Estero Apartments
Focus Development Group

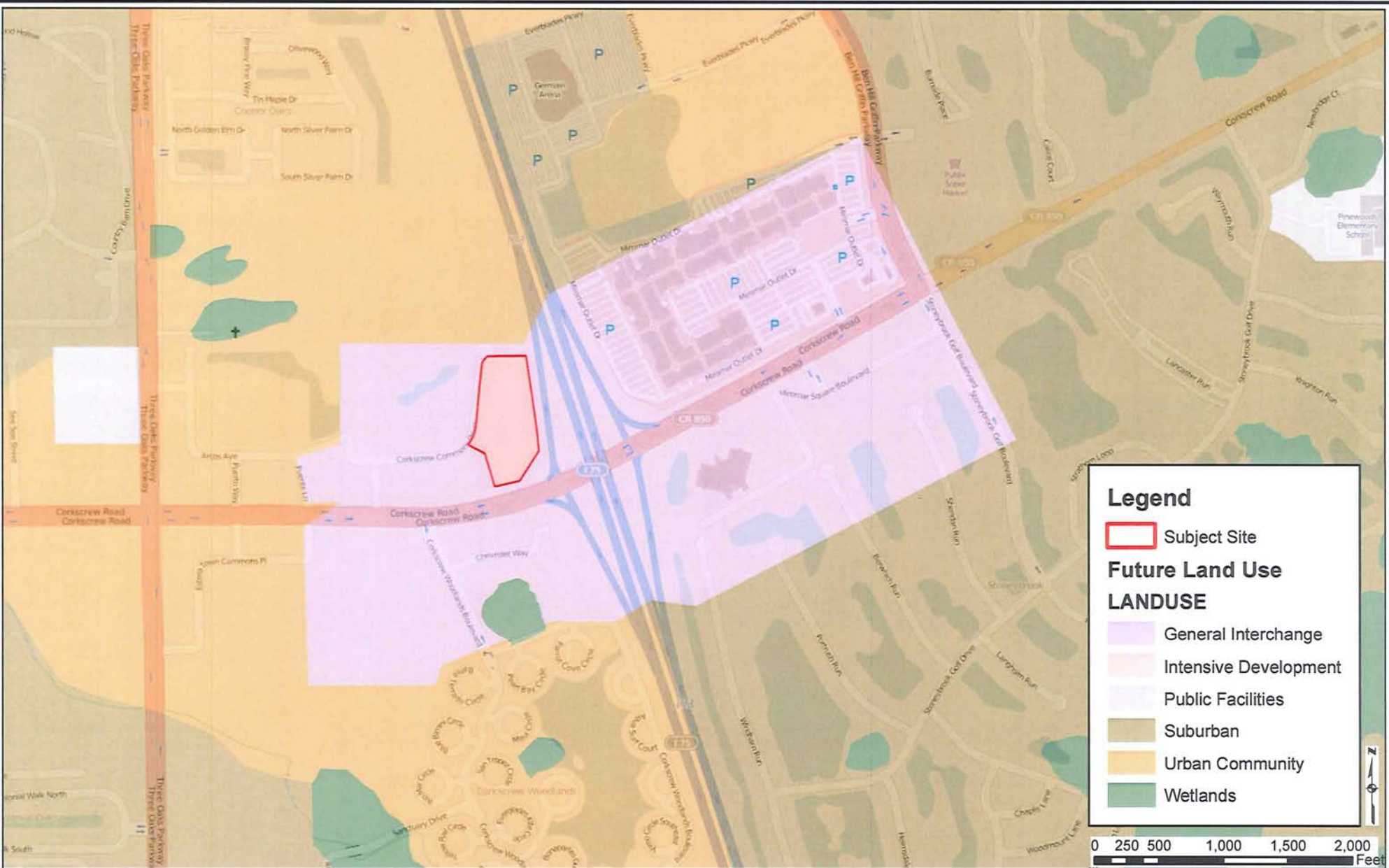
JOHNSON
ENGINEERING

2122 JOHNSON STREET
P.O. BOX 1550
FORT MYERS, FLORIDA 33902-1550
PHONE (239) 334-0046
FAX (239) 334-3661
E.B. #642 & L.B. #642

Existing Future Land Use Map

DATE	PROJECT NO.	FILE NO.	SCALE	SHEET
12/12/2013	20139560	00-00-00	As Indicated	1

L:\20130000\20139560-000 - Focus Development Group (Estero Apartments)\Permitting\Comp Plan Amendment\Proposed FLUM.mxd



Legend

- Subject Site

Future Land Use

LANDUSE

- General Interchange
- Intensive Development
- Public Facilities
- Suburban
- Urban Community
- Wetlands

0 250 500 1,000 1,500 2,000 Feet

Estero Apartments
Focus Development Group

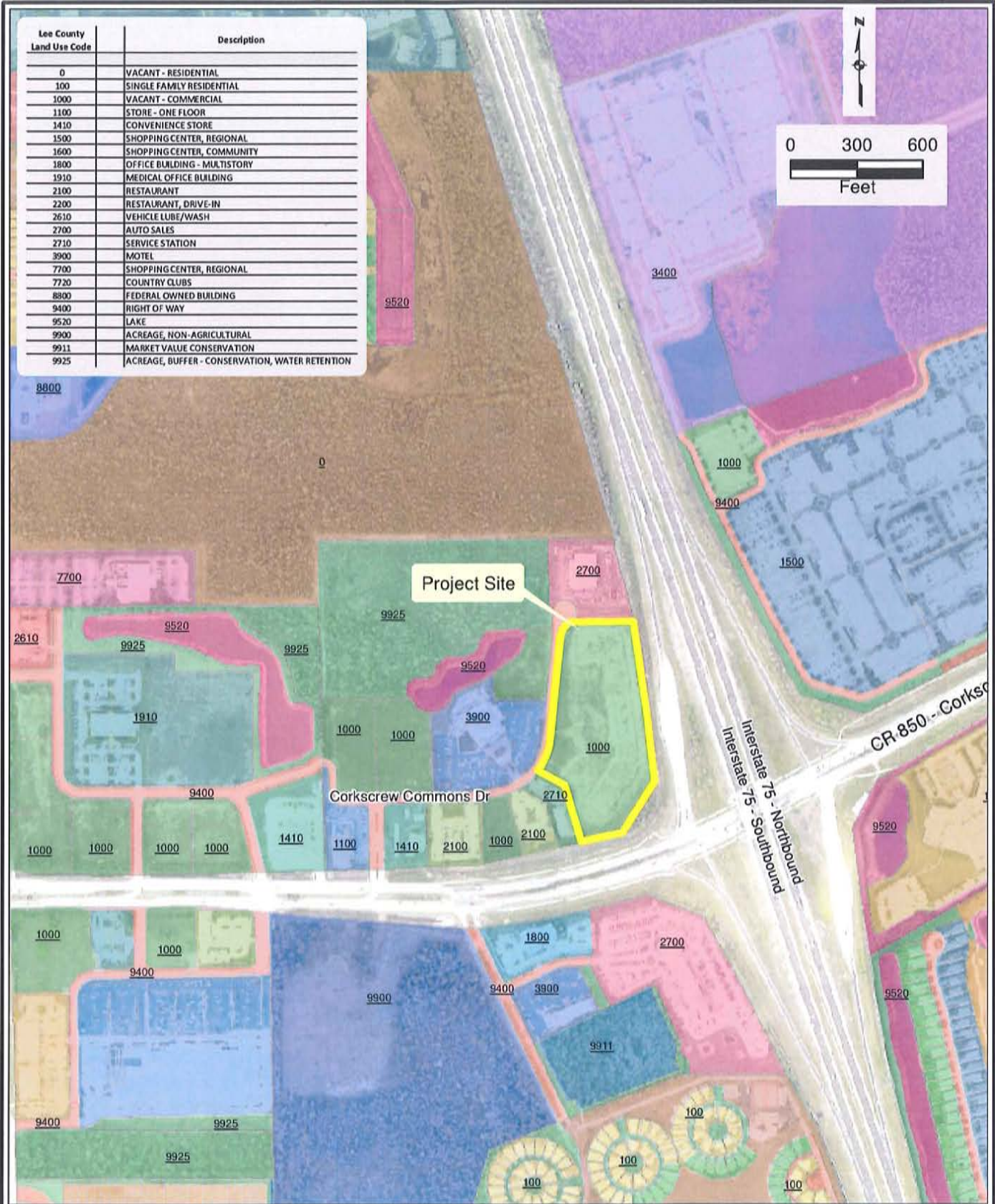
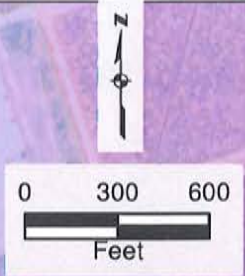
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Proposed Future Land Use Map

DATE	PROJECT NO.	FILE NO.	SCALE	SHEET
12/12/2013	20139560	00-00-00	As Indicated	1

Lee County Land Use Code	Description
0	VACANT - RESIDENTIAL
100	SINGLE FAMILY RESIDENTIAL
1000	VACANT - COMMERCIAL
1100	STORE - ONE FLOOR
1410	CONVENIENCE STORE
1500	SHOPPING CENTER, REGIONAL
1600	SHOPPING CENTER, COMMUNITY
1800	OFFICE BUILDING - MULTISTORY
1910	MEDICAL OFFICE BUILDING
2100	RESTAURANT
2200	RESTAURANT, DRIVE-IN
2610	VEHICLE LUBE/WASH
2700	AUTO SALES
2710	SERVICE STATION
3900	MOTEL
7700	SHOPPING CENTER, REGIONAL
7720	COUNTRY CLUBS
8800	FEDERAL OWNED BUILDING
9400	RIGHT OF WAY
9520	LAKE
9900	ACREAGE, NON-AGRICULTURAL
9911	MARKET VALUE CONSERVATION
9925	ACREAGE, BUFFER - CONSERVATION, WATER RETENTION



NOTE: Aerial shown is from Lee County dated Jan 2013.
 Land use data taken from Lee County Property Appraiser tax roll information dated Dec 2013.



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 FORT MYERS, FLORIDA 33902-1550
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 FAX (239) 334-3661
 E.B. #642 & L.B. #642

Estero Apartments Existing Land Use Map

DATE	PROJECT	FILE NO.	SCALE	SHEET
12/9/2013	20139560	00-00-00	As Shown	1

C:\2013\20139560-000\ArcGIS\Land Use 8x11.mxd



NOTE: Aerial shown is from Lee County dated Jan 2013.
 Zoning data taken from Lee County GIS datasets.



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 P.O. BOX 1550
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 E.B. #642 & L.B. #642

Estero Apartments Zoning Map

DATE	PROJECT	FILE NO.	SCALE	SHEET
12/9/2013	20139560	00-00-00	As Shown	1

Q:\2013\20139560-0001\arcGIS\Zoning 8x11.mxd



February 3, 2014

DESCRIPTION

**PART OF LOT 2, LOT 3 AND PART OF LOT 4
ESTERO INTERSTATE COMMERCE PARK
PLAT BOOK 73, PAGES 11-12, PUBLIC RECORDS OF LEE COUNTY, FLORIDA
SECTION 35, TOWNSHIP 46 SOUTH, RANGE 25 EAST
LEE COUNTY, FLORIDA**

A tract or parcel of land being part of Lot 2, all of Lot 3 and Part of Lot 4, Estero Interstate Commerce Park, recorded in Plat Book 73, Pages 11 and 12, Public Records of Lee County, Florida, lying in Section 35, Township 46 South, Range 25 East, Lee County, Florida, being more particularly described as follows:

Commencing at the northeast corner of Lot 2 of said plat; thence South 09° 40' 27" East along the east line of said plat 50.65 feet to an intersection with a line that is 50.00 feet south of (as measured on a perpendicular) and parallel with the north line of said Lot 2 and the Point of Beginning.

From said Point of Beginning the following bearings and distances along the east and south line of said plat: South 09° 40' 27" East for 25.16 feet; South 08° 13' 36" East for 409.51 feet; South 06° 33' 40" East for 298.39 feet; South 32° 35' 13" West for 272.20 feet; South 77° 38' 13" West for 189.33 feet; thence North 16° 44' 06" West departing the south line of said plat, for 266.39 feet; thence North 61° 44' 29" West for 138.63 feet to an intersection with a non-tangent curve being the east right-of-way line of Corkscrew Commons Drive (35 feet wide); thence northeasterly along said curved east right-of-way to the left of radius 282.50 feet (delta 31° 27' 05") (chord bearing North 21° 30' 35" East) (chord 153.13 feet) for 155.07 feet; thence North 05° 47' 04" East along said east right-of-way for 465.59 feet to a point of curvature; thence northeasterly along said easterly curved right-of-way to the right of radius 90.00 feet (delta 52° 45' 37") (chord bearing North 32° 09' 54" East) (chord 79.98 feet) for 82.88 feet to an intersection with a line that is 50.00 feet south of (as measured on a perpendicular) and parallel with the north line of said Lot 2; thence North 89° 32' 48" East departing said easterly right-of-way and along said line for 287.79 feet to the Point of Beginning.

Bearings mentioned hereon are based on the west line of Lot 2, of Estero Interstate Commerce Park, recorded in Plat Book 73, Pages 11-12, Public Records of Lee County, Florida to bear North 05° 47' 04" East.

MEMORANDUM

TO: Ms. Laura DeJohn, AICP
Johnson Engineering, Inc.

FROM: Ted B. Treesh
President

DATE: December 11, 2013

RE: Estero Interstate Commerce Park CPD
Zoning Amendment & Small Scale Comprehensive Plan Amendment
Lee County, Florida

TR Transportation Consultants, Inc. has completed a traffic circulation analysis for the proposed Small Scale Comprehensive Plan Amendment for property within the Estero Interstate Commerce Park pursuant to the requirements outlined within the application document for Comprehensive Plan Amendment requests as well as the analysis required to support the requested amendment to the existing CPD zoning. This analysis will determine the impacts of the requested land use change from General Interchange to Intensive Development and a zoning amendment to permit the development of a residential apartment community within the overall CPD. The Estero Interstate Commerce Park is a 47.5 acre existing commercial planned development (CPD) located at the northwest corner of I-75 and Corkscrew Road in the Estero area of Lee County, Florida. These amendments would only modify an 8.57 acre parcel that is within the overall CPD.

The transportation related impacts of the proposed Comprehensive Plan Amendment were evaluated pursuant to the criteria in the application document. This included an evaluation of the long range impact (20-year horizon) and short range impact (5-year horizon) the proposed amendment would have on the existing and future roadway infrastructure.

The proposed Map Amendment would change the future land use designation on the subject site from General Interchange to Intensive Development, which would then permit the 8.57 acre site to include multi-family residential units as an option for development within this parcel. Based on the existing land use designation (General Interchange) the subject site could be developed with a mix of commercial office, retail and industrial type uses. The Estero Interstate Commerce Park CPD is approved for

development based on Zoning Resolution Z-00-006. Several uses have been constructed within the CPD, including restaurants, an auto care center, a hotel and a golf cart and ATV sales/service center. The subject 8.57 acre site has received a Development Order (DOS2007-00066) by Lee County for the construction of up to 60,211 square feet of commercial retail uses and up to 7,454 square feet of restaurant uses. Table 1 compares the uses as approved under the existing Development Order (which has been extended to expire on 6/28/2015) and the uses being requested as part of the Small Scale Comprehensive Plan Amendment and zoning amendment application. The density of residential units is based on the base density of 14 units per acre plus a bonus density of 1.87 units per acre.

**Table 1
Land Uses
Estero Apartments**

Land Use Category	Intensity
Existing Land Uses	60,211 sq. ft. of Retail 7,454 sq. ft. of Quality Restaurant
Proposed Land Uses	136 Multi-Family Dwelling Units

The trip generation for the site was determined by referencing the Institute of Transportation Engineers' (ITE) report, titled *Trip Generation*, 9th Edition. Land Use Code 820 (Shopping Center) was utilized for the trip generation purposes of the retail use and Land Use Code 931 (Quality Restaurant) was utilized for the trip generation purposes of the restaurant use. This is consistent with the traffic study submitted with the original Development Order application. Table 2 indicates the trip generation of the subject site as approved under the current Development Order.

**Table 2
Trip Generation
Based on Approved Development Order
Estero Apartments**

Land Use	A.M. Peak Hour			P.M. Peak Hour			Daily (2-way)
	In	Out	Total	In	Out	Total	
Shopping Center (60,211 sq. ft.)	71	43	114	204	222	426	4,883
Quality Restaurant (7,454 sq. ft.)	4	2	6	38	18	56	670
Total Trips	75	45	120	242	240	482	5,553

Table 3 indicates the potential trip generation of the subject 8.57 acre site based on the proposed land use designation to allow multi-family residential units on the site. The trip generation between Apartments (Land Use Code 220) and Residential Condominium/

Townhouse (LUC 230) were compared and the land use that resulted in the greatest number of P.M. peak hour trips was utilized in the analysis.

Table 3
Trip Generation
Proposed Land Use Designation
Estero Apartments

Land Use	A.M. Peak Hour			P.M. Peak Hour			Daily (2-way)
	In	Out	Total	In	Out	Total	
Apartments (136 Units)	14	56	70	60	32	92	948
Residential Condominium /Townhouse (136 Units)	11	55	66	52	25	77	841

Table 4 indicates the trip generation difference between the proposed and existing land use designations.

Table 4
Trip Generation
Estero Apartments

Land Use	A.M. Peak Hour			P.M. Peak Hour			Daily (2-way)
	In	Out	Total	In	Out	Total	
Proposed Land Use Designation (136 Apartments)	14	56	70	60	32	92	948
Existing Land Use Designation (60,211 sq. ft of Retail and 7,454 sq. ft. Rest)	-75	-45	-120	-242	-240	-482	-5,553
Resultant Trip Change	-61	+11	-50	-182	-208	-390	-4,605

The negative number shown as the resultant change in Table 4 indicates that the trip generation will be decreased as a result of this land use change and zoning amendment action.

Long Range Impacts (20-year horizon)

The Lee County Metropolitan Planning Organization's (MPO) 2030 Long Range Transportation Plan was reviewed to determine if any future roadway improvements were planned in the vicinity of the subject site. Based on the review, the only major roadway improvement on the 2030 Financially Feasible Plan is the improvement to the I-75 interchange with Corkscrew Road. In addition, there are improvements currently identified on the 2030 Long Range Transportation Plan in the vicinity of the subject site that are designated as "Contingent" based upon additional funding. These improvements

include the widening of Corkscrew Road between Three Oaks Parkway and Ben Hill Griffin Parkway to a six-lane facility and the widening of Three Oaks Parkway north of Corkscrew Road to a six-lane facility.

The Lee County Metropolitan Planning Organization's (MPO) long range transportation travel model was also reviewed in order to determine the impacts the amendment would have on the surrounding area. The subject site lies within Traffic Analysis Zone (TAZ) 1609. The model has both productions and attractions included in this zone. The productions include both single-family homes and hotel rooms. The attractions include industrial employment, commercial employment, and service employment. Table 5 identifies the land uses currently contained in the long range travel model utilized by the MPO and Lee County for the Long Range Transportation Analysis.

Table 5
TAZ 1305

Land Uses in Existing Travel Model (2030)

Land Use Category	Intensity
Single Family Homes	50 dwelling units
Hotel Rooms	109 rooms
Industrial Employment	16 employees
Commercial Employment	169 employees
Service Employment	429 employees

The proposed change in land use designation on the subject site from General Interchange to Intensive Development would not have a substantial impact on the trip generation characteristics of the TAZ as included in the adopted 2030 travel model.

Short Range Impacts (5-year horizon)

The 2013/2014-2017/2018 Lee County Transportation Capital Improvement Plan and the 2014-2018 Florida Department of Transportation Adopted Work Program were reviewed to determine the short term impacts the proposed land use change would have on the surrounding roadways. Based on this review there are no programmed improvements in the vicinity of the subject site.

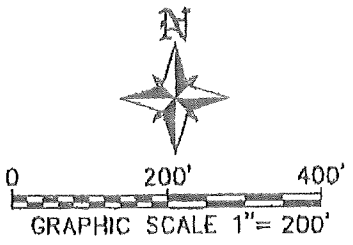
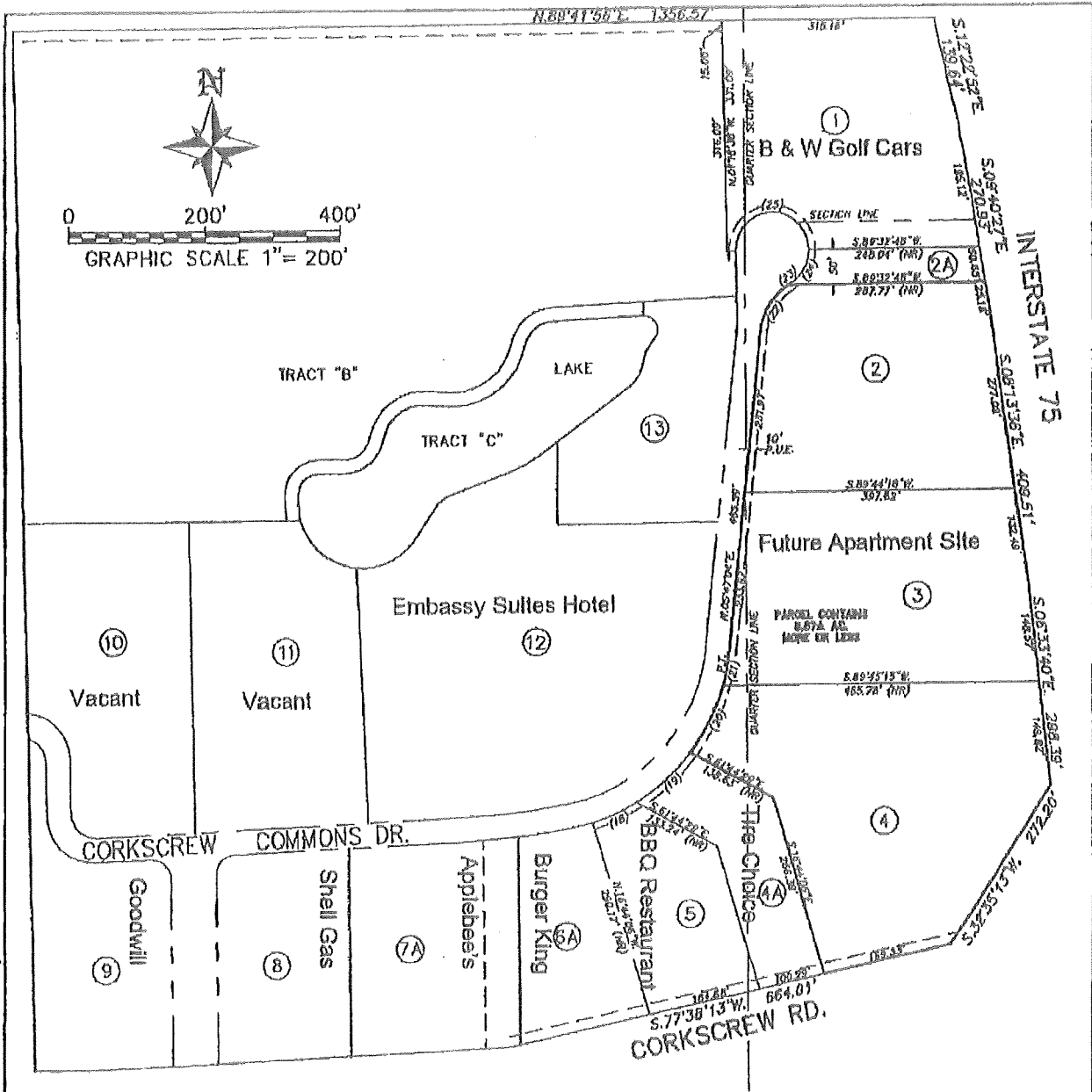
The proposed map amendment will decrease the overall trip generation of the subject site by approximately 390 vehicles during the P.M. peak hour. Table 1A and Table 2A attached to this report indicate the projected 5-year planning Level of Service on Three Oaks Parkway and Corkscrew Road based on the uses that would be permitted under the proposed land use designation. From Table 2A, Corkscrew Road and Three Oaks Parkway are both anticipated to operate at a Level of Service "C" in 2019 both with and without the trips from the proposed development. Therefore, based on this analysis no modifications will be necessary to the Lee County or FDOT short term capital improvement program.

Conclusion

The proposed Comprehensive Plan Amendment is to modify the future land use designation on the subject site from General Interchange to Intensive Development. The approximately 8.57-acre site is located on the north side of Corkscrew Road just west of I-75 in the Estero area of Lee County, Florida. Based on the analysis, no modifications are necessary to the Short Term or the Long Range Transportation plan to support the proposed Comprehensive Plan Amendment. In addition, the modifications to land use will not significantly alter the socio-economic data forecasts that were utilized in the development of the Long Range Transportation Plan.

The trip generation analysis indicates that as part of the zoning amendment of the subject site, the intensity of uses on the 8.57 acres will actually be reduced as a result of the multi-family residential units being provided. Therefore, the "worst case" analysis in terms of trip generation has already been completed when the site was originally rezoned (under Z-00-006). The rezoning of the subject site will not have any adverse impact on the surrounding roadways or intersection. The site is currently accessed through the internal roadway network within the Estero Interstate Commerce Park. These roadways connect to the public road network via a full and two directional site access drives on Corkscrew Road as well as a directional access drive on Three Oaks Parkway. No modifications to these access drives are necessary as a result of the amendment to the CPD to allow multi-family dwelling units on the subject site.

Attachments



CURVE TABLE

STA	RADIUS	DELTA	ARC	CHORD	CURVE BEARING
18	262.50'	147°22'	70.71'	70.82'	N.65°25'33"E
19	262.50'	21°41'22"	105.93'	105.90'	N.48°04'41"E
20	262.50'	21°50'21"	107.73'	107.02'	N.23°10'32"E
21	262.50'	29°38'09"	123.34'	122.26'	S.10°35'07"W
22	80.00'	52°46'58"	82.91'	80.01'	N.22°10'24"E
23	90.00'	02°14'28"	3.82'	3.82'	N.55°11'12"E
24	95.00'	61°17'03"	95.63'	95.86'	S.30°10'00"W
25	55.00'	180°46'31"	173.85'	110.80'	N.89°07'13"E

Banker Engineering, Inc.
 Professional Engineers, Planners & Land Surveyors
 FORT MYERS & NAPLES & BARABOTA
 10511 SIX BLUE CYPRESS PARKWAY - SUITE 101
 FORT MYERS, FLORIDA 33912
 PHONE: (239) 338-2400 FAX: (239) 339-2523
 ENGINEERING LICENSE # 16 9489
 SURVEY LICENSE # 16 6880

LOTS 3 AND A PORTION OF 2 & 4 SITE LOCATION SKETCH
ESTERO INTERSTATE COMMERCE PARK
 LEE COUNTY, FLORIDA

DATE	PROJECT	DRAWING	DESIGN	EXAMINER	CHECKED	SCALE	SHEET	OF	FILE NO. (S-T-R)
07/26/2005	1334	LOTS 2-4	YUH	RTS	RTS	1"=200'	1	1	SECTION 35 145-326

**TABLE 1A
PEAK DIRECTION PROJECT TRAFFIC VS. LOS C LINK VOLUMES
ESTERO APARTMENTS**

TOTAL AM PEAK HOUR PROJECT TRAFFIC = 70 VPH IN= 14 OUT= 56
 TOTAL PM PEAK HOUR PROJECT TRAFFIC = 92 VPH IN= 60 OUT= 32

<u>ROADWAY</u>	<u>SEGMENT</u>	<u>ROADWAY CLASS</u>	<u>LOS A VOLUME</u>	<u>LOS B VOLUME</u>	<u>LOS C VOLUME</u>	<u>LOS D VOLUME</u>	<u>LOS E VOLUME</u>	<u>PROJECT</u>			<u>PROJ// LOS C</u>
								<u>TRAFFIC DISTRIBUTION</u>	<u>NEW PROJ TRAFFIC AM PEAK</u>	<u>PM PEAK</u>	
Corkscrew Rd	W. of I-75	4LD	0	250	1,840	1,960	1,960	40%	22	24	1.30%
Three Oaks Pkwy	N. of Corkscrew Rd	4LD	0	260	1,840	1,960	1,960	25%	14	15	0.82%

The Level of Service thresholds for all roadways were obtained from the Lee County Generalized Service Volume Table

- Denotes a Significantly Impacted roadway segment

**TABLE 2A
ESTERO APARTMENTS
BUILD-OUT TRAFFIC VOLUMES AND 100TH HIGHEST HOUR LEVEL OF SERVICE ANALYSIS**

TOTAL AM PEAK HOUR PROJECT TRAFFIC = 70 VPH IN= 14 OUT= 56
 TOTAL PM PEAK HOUR PROJECT TRAFFIC = 92 VPH IN= 60 OUT= 32

ROADWAY	SEGMENT	SITE/ STATION	BASE YR	2011 ADT	YRS OF ADT	ANNUAL GROWTH	RATE	2011	2019		PROJECT TRAFFIC	AM PROJ TRAFFIC	PM PROJ TRAFFIC	2019		2019	
								PK HR	PK HR	PK SEASON				BCKGRND + AM PROJ	BCKGRND + PM PROJ	LOS	LOS
Corkscrew Rd	W. of I-75	15	25,000	29,500	9	1.86%	1,305	1,513	C	40%	22	24	1,535	C	1,537	C	
Three Oaks Pkwy	N. of Corkscrew Rd	415	11,100	20,200	9	6.88%	577	1,153	C	25%	14	15	1,167	C	1,168	C	

¹The 2011 peak hour, peak season, peak direction traffic volumes were taken from the 2012 Lee County Concurrency Report

CIP FY 13/14 - 17/18 TOTAL PROJECTS LIST

PROPOSED

REF #	PROJ #	PROJECT NAME	22-May-13	PROJECT STATUS (3/31/13)	FUNDING SOURCE	CURRENT BUDGET FY 12/13	CIP BUDGET FY 13/14	CIP BUDGET FY 14/15	CIP BUDGET FY 15/16	CIP BUDGET FY 16/17	CIP BUDGET FY 17/18	CIP BUDGET FY 13/14 - 17/18	CIP BUDGET YEARS 5-18	* TOTAL PROJECTED COST
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FUNDING SOURCE CODES: A = AD VALOREM; D = DEBT FINANCE; E = ENTERPRISE FUND; G = GRANT; GT = GAS TAX; I = IMPACT FEES; LA = LIBRARY AD VALOREM; S = SPECIAL; T = TOC; M = MSOLNTU
 COMP PLAN CODES: R = REQUIRED; NR = NOT REQUIRED; P = FURTHERS SPECIFIC OR GENERALIZED REQUIREMENT OF LEE PLAN; CATEGORY CODE 1 THROUGH 15

NATURAL RESOURCES

3	208574	Brazos/Fedilallicks Water Quality Improvements		Construction complete	A	253,375	0	0	0	0	0	0	0	2,287,655	
4	208588	Calcecuttellico TMDL Compliance		EMAP complete	A	1,032,735	1,000,000	1,000,000	1,000,000	2,000,000	2,000,000	7,000,000	20,000,000	32,101,000	
5	208589	Charlote Harbor TMDL Compliance		Awaiting FDEP direction	A	150,000	0	0	0	0	0	0	1,709,816	1,375,000	
6	208595	Culvert Replacement		Permitting at FDEP	A	841,200	0	0	0	0	0	0	0	1,343,000	
7	208572	Esquee Waterways Interconnect		Proposed	A	0	0	0	0	0	0	0	450,000	450,000	
8	208591	Emeralds-West Coast TMDL Compliance		EMAP complete	A	484,002	200,000	200,000	200,000	200,000	200,000	1,600,000	15,000,000	19,641,308	
9	208548	Fishier Creek Restoration		Permitting complete	A	75,000	0	1,400,000	0	0	0	1,400,000	0	1,881,511	
10	208549	Hickory Creek Filter Marsh		FDOT JPA approved	A	680,152	0	0	0	0	0	0	0	1,082,281	
11	208548	Island Park Filter Marsh		Maintenance & Rehabilitation	A	127,718	0	0	0	0	0	0	0	1,875,342	
12	208513	Lakes Park Water Quality Project		Construction complete	A/G	1,273,374	0	0	0	0	0	0	0	3,318,200	
13	208567	Nate Grade Stormwater Park		Letters of Interest due 4-2-13	A	750,530	0	0	3,000,000	0	0	3,000,000	0	3,400,001	
14	208503	NFM Surface Water Improvements		Letters of Interest due 4-2-13	A	800,000	0	1,000,000	1,000,000	1,500,000	1,000,000	4,000,000	0	4,800,000	
15	208558	Palmosa Park Water Quality Improvements		In design & permitting	A	351,078	500,000	0	0	0	0	500,000	0	950,000	
16	208556	Parking Lane Drainage		Construction substantially complete	A	202,400	0	0	0	0	0	0	0	255,024	
17	208593	Papash Creek Preserve		Complete	A	45,000	0	0	0	0	0	0	0	1,582,771	
18	208564	Powah Creek Hydrological Restoration		Maintenance filter marsh	A	313,002	0	0	0	0	0	0	0	3,735,151	
19	208591	Pratts Park Restoration		In design and permitting	A	405,700	0	0	0	0	0	0	0	500,000	
20	208578	Shank Creek Restoration		In design and permitting	A	323,372	100,000	400,000	0	0	0	600,000	0	1,040,515	
21	208537	Stanhilam/Wino Mills Run Drainage Improve		Proposed	A	0	0	100,000	300,000	0	0	400,000	0	4,300,950	
22	208565	Ten Mile Canal Filter Marsh		Construction Complete	A	2,107,037	0	0	0	0	0	0	0	450,000	
23	208509	Yellow Fever Creek Chain Improvements		On hold pending Cape Coral	A	17,913	0	171,000	0	0	0	571,000	0	807,835	
24	NATURAL RESOURCES CAPITAL TOTAL						10,120,526	1,800,000	4,671,900	5,550,000	3,200,000	3,200,000	10,421,000	45,855,816	83,821,438

TRANSPORTATION DEPARTMENT

26	204000	Alcoa Road Multi-Use		Acquiring maintenance access ROW	A/GT	224,257	0	0	0	0	0	0	0	19,458,087
26	205075	Alcoa Rd 4L - Dem 1 @ Airport Rd		Pathway design underway	GT	1,041,809	170,000	0	8,250,000	500,000	0	9,000,000	0	11,400,000
26	206002	Bicycle/Pedestrian Facilities		Demolish pathway to begin in May	GT 1-2/25	518,787	487,800	740,000	180,500	1,014,000	1,000,000	3,107,500	3,700,000	28,933,245

* = Total Projected Costs are all past expenses, current budget and all proposed budgets

PROPOSED

CIP FY 13/14 - 17/18 TOTAL PROJECTS LIST

REF #	PROJ #	PROJECT NAME	22-May-13	PROJECT STATUS (3/31/13)	FUNDING SOURCE	CURRENT BUDGET FY 12/13	CIP BUDGET FY 13/14	CIP BUDGET FY 14/15	CIP BUDGET FY 15/16	CIP BUDGET FY 16/17	CIP BUDGET FY 17/18	CIP BUDGET FY 13/14 - 17/18	CIP BUDGET YEARS 8-10	* TOTAL PROJECTED COST
FUNDING SOURCE CODES: A = AD VALOREM; D = DEBT FINANCE; E = ENTERPRISE FUND; G = GRANT; GT = GAS TAX; I = IMPACT FEES; IA = LIBRARY AD VALOREM; S = SPECIAL; T = TDC; M = MSBUTU														
COMP PLAN CODES: R = REQUIRED; NR = NOT REQUIRED; F = FURTHER SPECIFIC OR GENERALIZED REQUIREMENT OF LEE PLAN; CATEGORY CODE 1 THROUGH 5														
31	205724	Big Carlos Pass Bridge Replacement		Proposed	F	0	1,500,000	3,500,000	3,500,000	3,000,000	3,000,000	14,500,000	27,400,000	41,900,000
32	205720	Bonita Beach Road - Phase II		Construction underway	I-24,A,S	4,657,585	0	0	0	0	0	0	0	10,561,418
33	205723	Bonita Beach Road - Phase III		Design underway	I-24,A,S	92,806	0	0	0	0	0	0	22,800,000	24,817,170
34	205756	Branch/Drop Signalization		GoCC approved on 4-9-13	GT	25,000	200,000	0	0	0	0	200,000	0	225,000
35	204038	Dural Stone Round Four Lanes 78 to Van Buren		In design & purchasing ROW	P, A, I-27	1,594,210	1,000,000	9,137,000	700,000	5,500,000	240,000	16,675,000	17,970,000	38,435,400
36	205801	Cape/Midpoint Plaza Reconstruction		Construction complete	F	1,115,423	0	0	0	0	0	0	0	15,734,137
37	205653	Captiva Drive Shoulders		Complete	GI	4,100	0	0	0	0	0	0	0	1,235,450
38	204054	Colonel Blvd/Dr Mile to SR62		Major construction complete	I-23,A,S	3,927,575	0	0	0	0	0	0	0	32,603,000
39	NEW	Corbett Rd Widening/Restoration		Proposed	GT	0	0	150,000	680,000	0	0	840,000	0	840,000
40	205665	Corkscrew Drive		Ongoing residential siteimprovement	GT	10,000	0	0	0	0	0	0	0	990,423
41		Cypress Drive 2 Lane Divided		Proposed	GT	0	0	0	0	0	550,000	800,000	1,275,000	7,125,000
42	205077	Cypress/Panorama Roundabout		ROW acquisition underway	GT	125,000	450,000	0	0	0	0	450,000	0	975,000
43	205072	Daniels BL / Trochile-Gateway		Complete	I-23,A,GT	1,110,700	0	0	0	0	0	0	0	4,855,108
44	205078	Daniels Resurfacing Site Mile to I-75		Construction to begin 3rd quarter	GI	1,700,000	0	0	0	0	0	0	0	1,700,000
45	205062	Del Prado ROW		Waiting on final invoice from CYS		200,000	0	0	0	0	0	0	0	3,299,824
46	208868	Del Prado Signals/Resurfacing		Construction underway	GT,S	858,700	0	0	0	0	0	0	0	985,000
47	205038	E-ARCS Upgrade for LeeWay		Complete	F	68,000	0	0	0	0	0	0	0	311,899
48	205067	Estero Blvd Improvements		Preliminary design underway	GT,S	2,448,046	7,000,000	300,000	0	750,000	7,000,000	15,650,000	31,000,000	50,100,000
49	205071	Estero Parkway Extension		Landscaping phase	S,GT,A,I	208,765	0	0	0	0	0	0	0	57,190,523
50	205665	Fiber Ring		Proposed	E	0	350,000	0	0	0	0	350,000	0	350,000
51	204053	Gibralter Widening		A&W Bulk construction underway	A,GT,I,24	3,302,483	0	0	0	0	0	0	0	24,100,732
52	205660	Hickory Blvd Paved Shoulders		Complete	GT	4,000	0	0	0	0	0	0	0	404,004
53	205063	Honestead 4L / Sunrise-Alabama		Design & ROW acquisition underway	I-23,A,Loan	1,034,858	3,400,000	185,000	12,100,000	680,000	0	16,340,000	0	19,540,000
54	205060	Honestead Road Complete Street		Design to begin in 4th quarter	GT	1,500,000	0	0	0	0	0	0	0	1,500,000
55		Kinross/Lillie/Realignment		Proposed	I-22	0	0	0	0	137,500	675,000	812,500	680,600	1,500,000
56	205068	Ludlow Road 4L / Ortiz to I-75		Finalizing ROW acquisition	I-23,A	500,207	0	0	0	0	0	0	3,069,000	4,219,500
57	205004	Malhache Pass Bridge Replacement		Under construction	I-22,GT,A	2,427,435	0	0	0	0	0	0	0	24,652,665
58	205074	Milwaukee Bank		Ongoing permit discussions w/CDTP	GT	23,258	0	0	0	0	0	0	0	135,001
59	204100	North Airport Road Extension West		In design by Developer	Loan	4,132,574	0	0	0	0	0	0	0	4,470,000
60	205079	North Airport Road Reconstruction		Design is proposed for consultant	GI	600,000	1,800,000	0	0	0	0	1,800,000	0	2,200,000
61		Ortiz 4L / Colonel MLK		Proposed	I-23,A	0	0	0	0	0	0	0	18,813,000	18,813,000

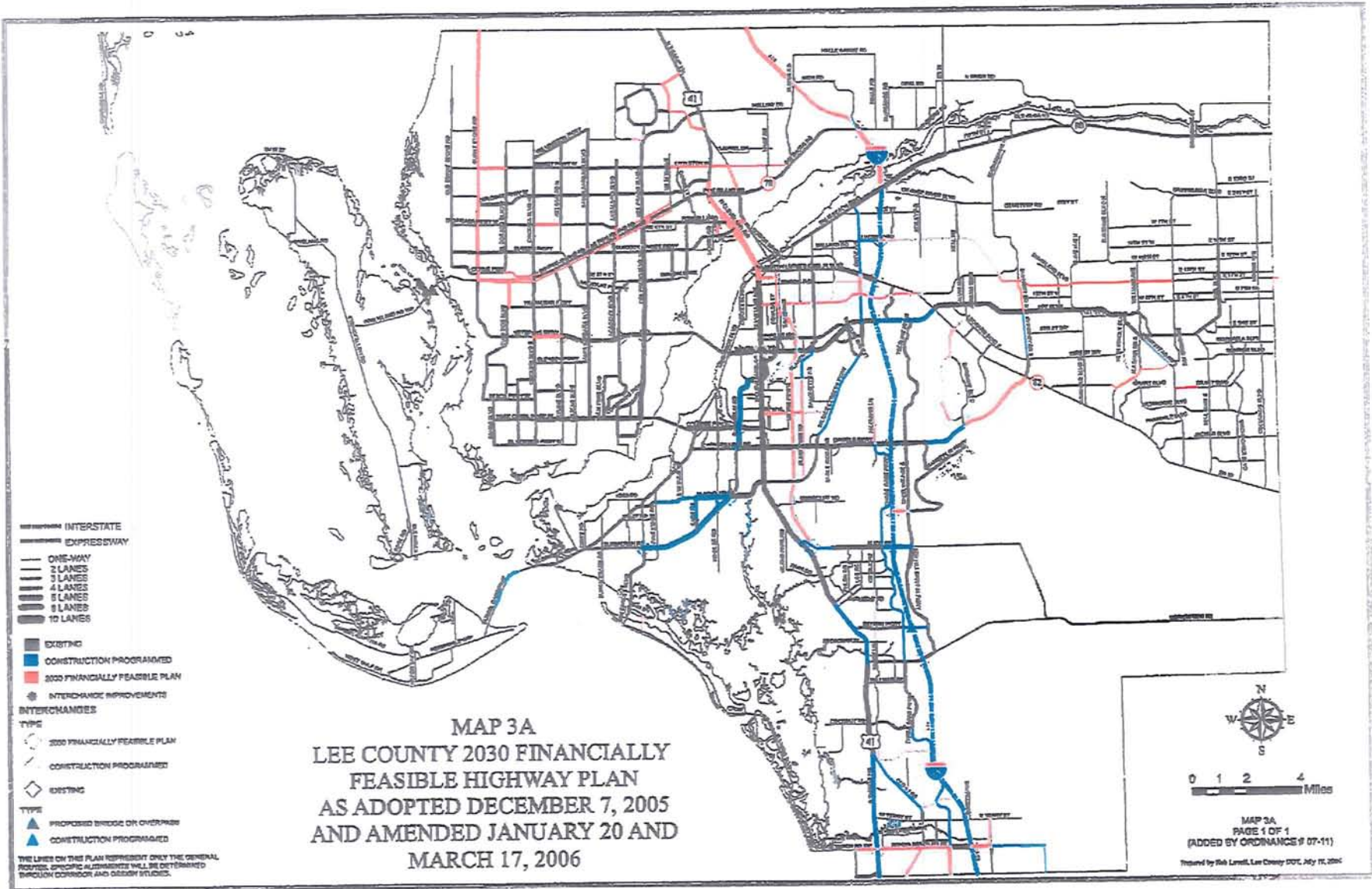
* Total Projected Costs are all past expenses, current budget and all proposed budgets

CIP FY 13/14 - 17/18 TOTAL PROJECTS LIST

PROPOSED

REF	PROJ	22-May-13	PROJECT STATUS	FUNDING	CURRENT	CIP	CIP	CIP	CIP	CIP	CIP	CIP	CIP	TOTAL
NO	NO	PROJECT NAME	(03/11/13)	SOURCE	BUDGET	BUDGET	BUDGET	BUDGET	BUDGET	BUDGET	BUDGET	BUDGET	BUDGET	PROJECTED COST
					FY 12/13	FY 13/14	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 13/14 - 17/18	YEARS 5-10		
FUNDING SOURCE CODES: A = AD VAL OREM, D = DEBT FINANCE, E = ENTERPRISE FUND, G = GRANT, GT = GAS TAX, I = IMPACT FEES, LA = LIBRARY AD VALOREM, S = SPECIAL, T = TDC, M = MISCELLANEOUS COMP PLAN CODES: R = REPAIR/RENOVATION, NR = NOT REQUIRED, F = FURTHER SPECIFIC OR GENERALIZED REQUIREMENT OF LEE PLAN, CATEGORY CODE 1 THROUGH 5														
67	204056	Orin Avenue/SR80 - I-24	ROW acquisition underway	I-24,A	3,142,135	0	0	0	0	0	0	10,550,000	27,109,419	
68	204072	Orin Park Landscaping - MILK to Lockwell	ROW acquisition underway	I-24,A,G	113,502	0	0	0	0	0	0	9,725,000	10,031,475	
69	204064	Plantation EM, Howard to Colonel	In budgeting maintenance phase	I-4,A	50,033	0	0	0	0	0	0	0	5,371,704	
65	203850	Signal System Control Software	Complete	GT	7,974	0	0	0	0	0	0	0	340,001	
66	203750	Signal System AIMS Upgrade	Including new installations on Gadsden, Cokescrew & Alto	GT	570,723	750,000	750,000	750,000	0	0	2,250,000	0	3,750,000	
67	204804	See Lee Cypress Pkwy 4 Lanes	Substantially complete	I-23,A	2,647,280	0	0	0	0	0	0	0	10,244,555	
68	203501	Summerlin Bkr-Pad Accommodation	Construction underway	GT	871,213	0	0	0	0	0	0	0	885,000	
69	203007	Summerlin Road-Boy Scout to Cypress Lake	Finalizing drainage issues	GT,I-23,A	3,278,344	0	0	0	0	0	0	0	36,133,081	
70	204053	Three Oaks Pkwy Extension, North	Design and ROW underway	I-24,A,GT	3,985,950	0	0	0	0	0	0	35,775,553	52,401,008	
71	204043	Three Oaks Pkwy Extension, South	Preparing proposal to construct parcel	I-4,GT,S	3,442,302	0	0	0	0	0	0	0	62,740,704	
72	204031	Three Oaks Pkwy Widening	Landscaping phase	I-24,A,GT	210,820	0	0	0	0	0	0	0	32,582,520	
73	203918	Toll Interoperability	Plans to modify lane equipment	E	100,000	750,000	0	0	0	0	750,000	0	850,000	
74		Toll System Replacement	Proposed	E	0	0	0	0	4,540,000	3,200,000	8,740,000	1,380,000	8,700,000	
75	203037	Traffic Mgmt Center Upgrade	Substantially complete	GT,S	31,230	0	0	0	0	0	0	0	182,551	
76		TRANSPORTATION CAPITAL TOTAL			38,238,865	17,545,000	14,727,000	24,350,500	15,274,500	14,971,000	80,075,000	180,745,353	788,838,898	
77														
78		UTILITIES												
79		Airport Migration Park ASH System	Proposed	F	0	0	0	0	0	0	0	71,970,000	21,970,000	
80	207514	Alcoa Mill 4L-360 JMW Airport Haul/MSW Pallet	Per LDCOT schedule	F	350,000	0	0	3,750,000	0	0	3,750,000	0	4,100,000	
81	207143	Alcoa Road Water Main Replacement/MSW Pkwy Ex	Delete project	E	0	0	0	0	0	0	0	0	1,566,768	
82	NEW	BoysTown Rd 24" WM-Savville to N. Tamiami	Proposed	E	0	0	0	0	0	0	0	3,450,000	2,450,000	
83	NEW	Buss HWY 67/110 Force Main Invarna South	Proposed	E	0	0	425,000	4,575,000	0	0	5,000,000	0	5,000,000	
84	207305	Bus Hn 67th Parallel Fortson	Contractor contract to R400 in April	E	1,102,514	0	0	0	0	0	0	0	1,102,514	
85	207144	Bus 41 Lane Upgrade-Lithia/Shell Pallet	Design Complete	E	133,234	0	0	0	0	0	0	0	133,234	
86	NEW	Colonial 30" Water Main-Ortiz to Gunnery	Proposed	E	0	0	0	0	0	0	0	3,100,000	3,100,000	
87		Cokescrew Aerial Improvements	Delete project	F	0	0	0	0	0	0	0	0	0	
88	207150	Cokescrew Rd - Bank III to the Habitat	Delete project	E	0	0	0	0	0	0	0	0	11,157	
89	207158	Cokescrew Road 2.1-7b Interchange	Proposed	F	0	0	0	0	0	0	0	3,000,000	3,056,703	
90		Cokescrew WTP Extension to 20 MGD	Delete project	F	0	0	0	0	0	0	0	0	0	
91		Cokescrew WTP Wellfield Improvements	Delete project	F	0	0	0	0	0	0	0	0	0	

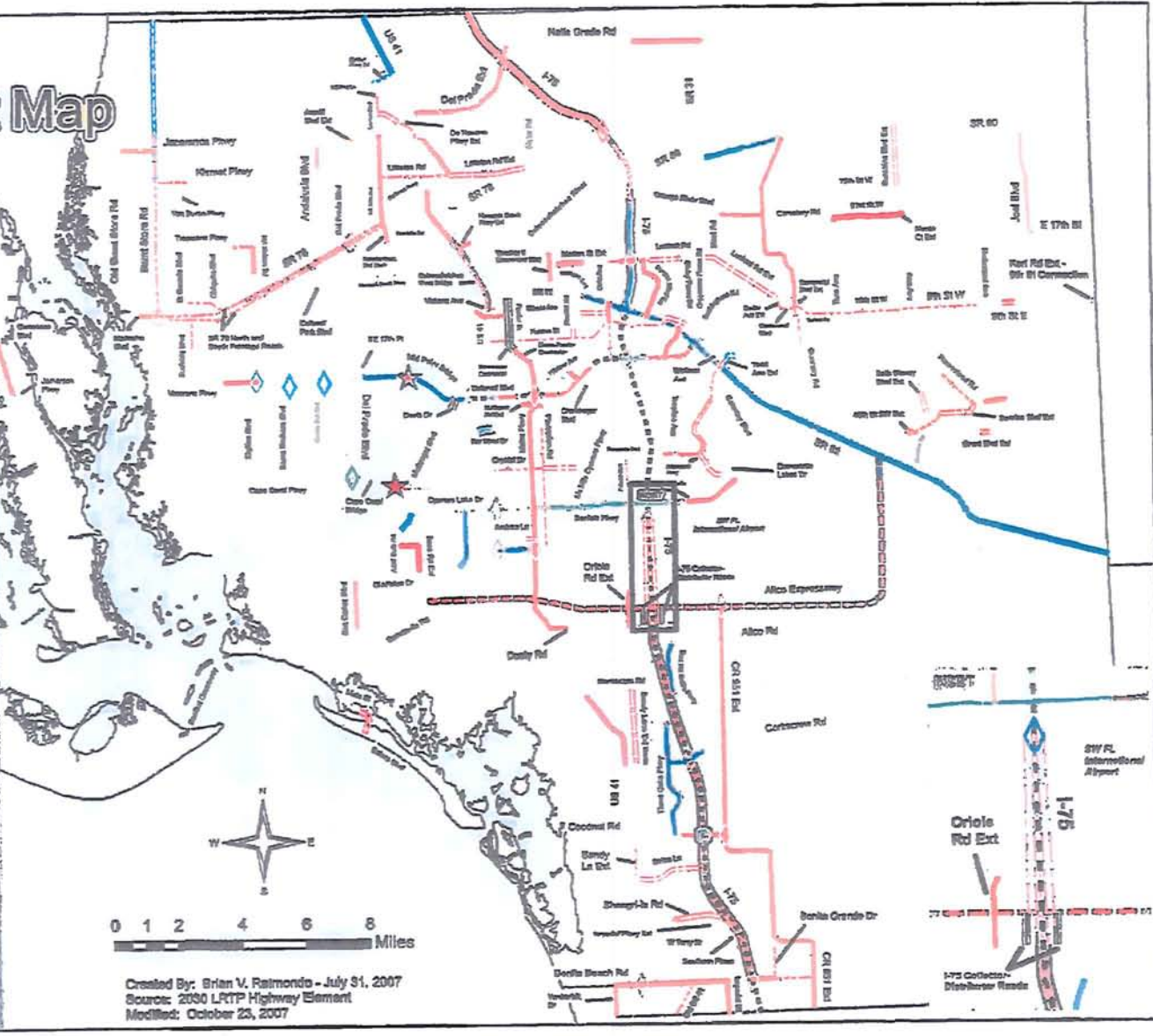
* - Total Projected Costs are all past expenses, current budget and all proposed budgets



2030 LRTP Highway Element Map

Legend

- Financially Feasible 2 Lanes
- Financially Feasible 3 Lanes (One Way)
- Financially Feasible 4 Lanes
- Financially Feasible 6 Lanes
- Financially Feasible 8 Lanes
- Financially Feasible 6 Lanes + 4 Express Lanes
- ⊕ Financially Feasible Interchange Improvements
- ★ Financially Feasible Open Road Tolling
- I-75/Coconut Rd Interchange Study
- Contingent 2 Lanes
- Contingent 4 Lanes
- Contingent 4 Express Lanes
- Contingent 8 Lanes
- Contingent 8 Lanes
- Contingent 10 Lanes
- Contingent 12 Lanes
- Contingent 4 Lanes + 6 Express Lanes
- Contingent 5 Lanes + 4 Express Lanes
- Contingent 4 Lanes + 4 Express Lanes
- Contingent 8 Lanes + 4 Express Lanes
- Contingent Interchange Improvements
- Financially Feasible & Contingent Interchange Improvements



Created By: Brian V. Rainolds - July 31, 2007
 Source: 2030 LRTP Highway Element
 Modified: October 23, 2007

**Focus Development Group Estero Apartments
Comprehensive Plan Amendment**

Exhibit IV.B.2.

Existing and Future Conditions Analysis

WATER

Existing Conditions

Presently Lee County Utilities owns a 10-inch water main that is located along the east side of Corkscrew Commons Drive.

Plant Capacity

The Corkscrew Water Treatment Plant serves the project site. Presently this plant is designed for 15 Million Gallons per Day (MGD) of production. Per the Lee County Concurrency Report (2011), the projected Peak Month Daily usage is approximately 8.7 MGD. Therefore, there is an estimated surplus capacity of 6.3 MGD.

The existing South Florida Water Management District (SFWMD) consumptive water use permit #36-00003-W (which covers the Olga, Green Meadows and Corkscrew plants) states that the permitted allocation is 30.37 MGD of raw water during a maximum month. Per the Lee County Concurrency Report, a total of 17.3 MGD of finished water was actually produced by the three water treatment plants during 2010.

Future Conditions

For this project, the ideal connection point(s) would be along Corkscrew Commons Drive. It is recommended to loop the water main internally or externally to allow for redundancy within the system.

The Factors shown within Table 1 are provided from Lee County Utilities Operations Manual.

Table 1: Proposed Water and Wastewater Flows

Unit Type	Units	Factor (GPD/Unit)	Average Daily Flow (GPD)	Average Daily Flow (GPM)	Peak Factor	Peak Day Flow (GPM)
Multi-family	136	200	27,200	19	3.5	66

Minimum Level of Service

As stated within "The Lee Plan," (Policy 95.1.3)

Minimum Acceptable Level of Service (LOS):

Within certificated, franchised, or designated service areas only: supply and treatment capacity of 250 gallons per day per Equivalent Residential Connection (ERC) for the peak month, except that facilities serving only mobile home residential structures must have a capacity of 187.5 gallons per day, and facilities serving only travel trailer residential structures must have a capacity of 150

**Focus Development Group Estero Apartments
Comprehensive Plan Amendment**

Exhibit IV.B.2.

Existing and Future Conditions Analysis

gallons per day. Where a private water utility has provided an alternate standard for application within its certificated or franchised area, and that standard has been adopted into this comprehensive plan, that will be the standard to be used for concurrency management in the respective certificated or franchised area.

Presently the County meets the minimum LOS for the Green Meadows Water Treatment Plant, there is a surplus of 25,200 ERC's of additional flow based on 6.3 MGD of available capacity. Per the 'Bureau of Economic Business Research' Lee County is projected to grow by approximately 50% by 2030 in population.

The anticipated 27,200 GPD for this project adds approximately 109 ERC to the treatment facility. It appears that the present plant capacity should be able to accommodate this project.

SANITARY SEWER

Existing Conditions

Presently Lee County Utilities owns the gravity sewer system that is laid along Corkscrew Commons Drive and is directed south to Lift Station 7795. Flow from this lift station is directed to the west along Corkscrew and then north on Three Oaks Parkway, ultimately discharging into the Three Oaks Wastewater Treatment Plant (WWTP)

Future Conditions

It is recommended to core a hole into one of the existing manholes along Corkscrew Commons Drive and extend the gravity sewer onsite. Based on testing performed on Lift Station 7795 from June 10, 2013 through June 17, 2013 it appears there is sufficient capacity to direct the 66 GPM to this station.

Minimum Level of Service

As stated within "The Lee Plan," (Policy 95.1.3)

Minimum Acceptable Level of Service:

Within certificated, franchised, or designated service areas only: average treatment and disposal capacity of 200 gallons per day per Equivalent Residential Connection (ERC) for the peak month, except that facilities serving only mobile home residential structures must have a capacity of 150 gallons per day, and facilities serving only travel trailer residential structures must have a capacity of 120 gallons per day. Where a private sewer utility has provided an alternate standard for application within its certificated or franchised area, and that standard has been adopted into this comprehensive plan, that will be the standard

**Focus Development Group Estero Apartments
Comprehensive Plan Amendment**

Exhibit IV.B.2.

Existing and Future Conditions Analysis

to be used for concurrency management in the respective certificated or franchised area.

Presently the County meets the minimum LOS for the Three Oaks WWTP; there is a surplus of 16,000 ERC's (3.2 MGD) of additional flow based on 6.0 MGD minus 2.8 MGD (per projections in Lee County Concurrency Report 2012) of available capacity.

The anticipated 27,200 GPD for this project adds approximately 109 ERC to the treatment facility. It appears that the present plant capacity should be able to accommodate this project.

RECLAIMED WATER

Presently there is a recorded Agreement for the Delivery and Use of Reclaimed Effluent Water (Instrument# 2007000343669, Page 18) to this subject property. This agreement states that Lee County will provide an average of 0.006 MGD to the point of delivery located on the south end of the subject property.

SURFACE WATER/DRAINAGE BASINS

An exhibit showing historic and current flowways is provided as Exhibit 24 with the CPD Amendment Application that is filed concurrently with this Comprehensive Plan Amendment Application. The subject site is located where a master surface water management system has been permitted previously by the South Florida Water Management District.

Environmental Resource Permit (ERP) 36-03865-P was approved in October 2000 under application number 991105-27. This permit approved construction of a master surface water management system serving the entire 47.5 acre project known as Estero Interstate Commerce Park. The master surface water management system provides the necessary water quality and attenuation for the entire 47.5 acre project. Each individual lot is limited to a maximum impervious cover of 70%. In addition, each lot is required to provide at least 1/2" of onsite dry pretreatment prior to discharging into the backbone system. For parcels exceeding the 70% threshold, full onsite water quality and attenuation will be required for the additional impervious cover.

A subsequent modification to ERP 36-03865-P was approved under application number 070320-20 for the subject 8.57 acre site to accommodate a proposed retail center that has not been constructed. The proposed project will supersede the

**Focus Development Group Estero Apartments
Comprehensive Plan Amendment**

Exhibit IV.B.2.

Existing and Future Conditions Analysis

modifications proposed in application number 070320-20.

ERP 36-03865-P will be modified to accommodate the proposed multifamily development and will meet all the requirements of the existing ERP. Modification of the ERP will include submitting calculations which show the project will provide the required on-site dry pretreatment prior to discharge into the master surface water management system (master system). The proposed project will not exceed the maximum 70% impervious surface as required by the existing ERP. The existing master system provides the required attenuation of the 25 year 3 day storm event and therefore discharge from the proposed project is not limited prior to conveyance to the master system.

The existing ERP also provides the following stipulation for projects exceeding the 70% impervious coverage. "For parcels exceeding the 70% threshold, full onsite water quality and attenuation will be required for the additional impervious cover." The proposed project will either be constructed within the allowable impervious coverage or provide the additional treatment as required by the permit.

The project will also be designed meet all design elevations permitted in ERP 36-03865-P. The following table provides the flood stages and design elevations of the permit.

FLOOD PROTECTION REQUIREMENTS

ROAD & PARKING LOT DESIGN:

5 YR-1 DAY RAINFALL (IN.)	5.20
5 YR-1 DAY FLOOD STAGE (FT. NGVD)	16.48
MIN. ROAD CENTERLINE ELEVATION (FT. NGVD)	17.60
MIN. PARKING CROWN ELEVATION (FT. NGVD)	17.60

PERIMETER GRADING DESIGN:

25 YR-3 DAY RAINFALL (IN.)	10.87
25 YR-3 DAY FLOOD STAGE (FT. NGVD)	17.26
MIN. PERIMETER GRADE ELEVATION	17.50

BUILDING FINISH FLOOR DESIGN:

100 YR-3 DAY RAINFALL (IN.)	13.45
100 YR-3 DAY FLOOD STAGE	17.78
MIN. FINISH FLOOR ELEVATION (FT. NGVD)	19.50

PARKS, RECREATION AND OPEN SPACE

Existing Condition – Regional Parks

The surrounding community has adequate levels of service related to parks and recreation. Specific community facilities available and adequate to serve the

**Focus Development Group Estero Apartments
Comprehensive Plan Amendment**

Exhibit IV.B.2.

Existing and Future Conditions Analysis

project exist within close proximity, including: Estero Community Park within 1.4 miles, and schools that provide opportunity for recreation including Pinewoods Elementary School within 2.1 miles, Bonita Springs Charter Middle School within 6.9 miles, and Estero High School within 2.1 miles.

Policy 95.1.3 of the Lee Plan establishes minimum acceptable level of service standards for regional parks at 6 acres of developed regional park land open for public use per 1,000 total seasonal county population. The 2013 estimated functional population of Lee County was 759,173 based on BEBR Estimates. At that functional population estimate, the need for regional park acreage to meet minimum level of service standards calculates to 4,555.04 acres.

According to the Lee County 2013 Concurrency Report, there are 7,220 acres of existing Regional Parks currently operated by the County, City, State and Federal governments.

Minimum level of service standards are currently met and exceeded for Regional Parks.

Future Condition – Regional Parks

The proposed addition of 136 dwelling units with up to 2.34 persons per household (*source*: BEBR estimated persons per household for Lee County, 2013) is equivalent to a need of 1.92 acres of Regional Park. This persons per household factor is conservative given the development is proposed to contain approximately 44 one-bedroom units (or 32% to be one-bedroom units), which are likely to accommodate one or two persons per household.

The proposed Estero Apartments calculates to a regional park need of 1.92 acres, so the existing facilities are more than adequate to satisfy the level of service needed for the proposed development. The existing supply shall meet the minimum level of service standard as well as the “Desired Future Level of Service Standard” for the population through 2018, as stated in the 2013 Lee County Concurrency Report.

Existing Condition – Community Parks and Recreation Centers

Policy 95.1.3 of the Lee Plan establishes minimum acceptable level of service standard for community parks at 0.8 acres of developed standard community parks open for public use per 1,000 permanent population, unincorporated county only. The subject site is within the Estero/San Carlos/Three Oaks Community Park Benefit District. The 2013 Lee County Concurrency Report lists Estero Community Park and Rec Center, Karl Drews Community Center and Park, San Carlos Pool, and Three Oaks Community Park, totaling 113 acres within this Benefit District. Also listed are two existing community parks jointly used with

**Focus Development Group Estero Apartments
Comprehensive Plan Amendment**

Exhibit IV.B.2.

Existing and Future Conditions Analysis

the School District: Estero High School and San Carlos Elementary School, totaling 19 acres. The cumulative total of 132 acres is approximately triple the minimum level of service requirement for the Benefit District.

The Estero Community Park located within 1.4 miles of the subject site encompasses 65 acres. At 65 acres, Estero Community Park is adequate to serve a population of up to 81,250 permanent residents according to the minimum level of service standard.

Within the Census-designated boundary for Estero, the 2010 permanent population was 22,612, which generated a minimum community park demand equivalent to 18.09 acres based on LOS of 0.8 acres per 1,000 permanent population.

The Estero Community Park contains a 40,000 square foot community recreation center. Objective 83.2 of the Lee Plan states that Lee County will provide four Community Recreation Centers of 25,000 square feet or more to provide for the need of unincorporated Lee County residents. The recreation center at Estero Community Park is an adequate facility, well exceeding the minimum size by 15,000 square feet.

Future Condition – Community Parks and Recreation Centers

The Estero Planning Community population distribution per Table 1(b) Year 2030 Allocations is 25,395, which generates a minimum community park demand of 20.32 acres. The proposed addition of 136 dwelling units with up to 2.34 persons per household (*source*: BEBR estimated persons per household for Lee County, 2013) is equivalent to a need of 0.26 acres of Community Park. This persons per household factor is conservative given the development is proposed to contain approximately 44 one-bedroom units (or 32% to be one-bedroom units), which are likely to accommodate one or two persons per household.

The Estero Community Park exceeds minimum level of service standards for community parks for the Planning Community of Estero by over 20 acres. The proposed Estero Apartments calculates to a community park need of 0.26 acres, so the existing facilities are more than adequate to satisfy the level of service needed for the proposed development.

The recreation center at Estero Community Park satisfies the community's need for a recreation center and exceeds the minimum size by 15,000 square feet, therefore it should appropriately provide for the recreation center needs generated by the proposed 136 multifamily units.

The 2013 Lee County Concurrency Report reflects that the Estero/San

**Focus Development Group Estero Apartments
Comprehensive Plan Amendment**

Exhibit IV.B.2.

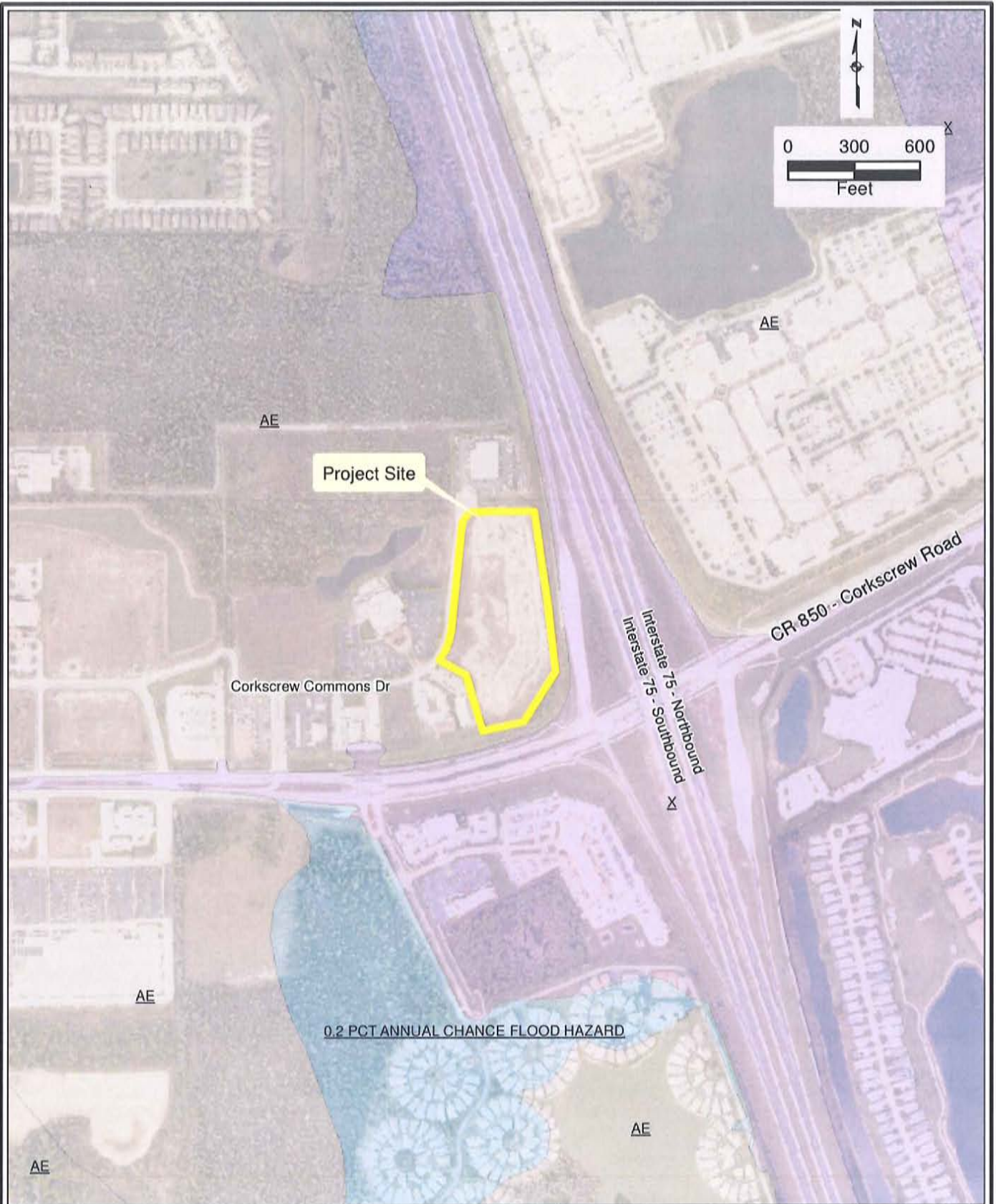
Existing and Future Conditions Analysis

Carlos/Three Oaks Community Park Benefit District has resources to meet the minimum level of service standards, as well as the “Desired Future Level of Service Standard” for Community Parks through 2018, and those resources will accommodate additional population well into the future.

In addition to the above referenced public park and recreation facilities, an area of 3.43 acres, or 40% of the subject site, will be Open Space that residents will be able to access on site.

PUBLIC SCHOOLS

A letter to Lee County dated January 13, 2014 determining the adequacy of school facilities for the subject property was issued by The School District of Lee County, indicating the level of service is adequate to accommodate school children of the proposed 136-unit multifamily development.



NOTE: Aerial shown is from Lee County dated Jan 2013.
 Flood data taken from FEMA DFIRM data and cross checked against current panels 12071C0591F and 12071C0592F.

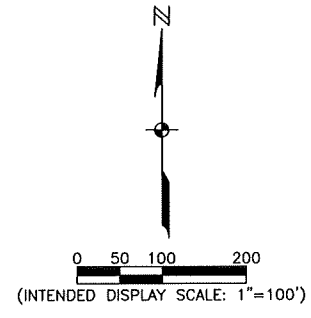
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Estero Apartments
FEMA Map

DATE	PROJECT	FILE NO.	SCALE	SHEET
12/9/2013	20139560	00-00-00	As Shown	1

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FOCUS DEVELOPMENT GROUP

ESTERO APARTMENTS
 LEE COUNTY, FLORIDA

FLUCFCS CODE	DESCRIPTION	USACOE STATUS	STATE STATUS
740	Previously Cleared (Permitted) Disturbed Land	N	N
742	Stormwater Management Pond	OSW	OSW

LEGEND	
N	NON JURISDICTIONAL
	EXISTING SFWMD CONSERVATION EASEMENT
OSW	OTHER SURFACE WATER

- NOTES:**
1. NOMENCLATURE AND DELINEATIONS AS PER FLORIDA LAND USE, COVER AND FORMS CLASSIFICATIONS SYSTEMS (FLUCFCS), (FD01, 1999).
 2. THE FLUCFCS LINES AND ACREAGES HAVE BEEN ESTIMATED FROM A 2013 MRSID DIGITAL AERIAL IMAGE AND ARE APPROXIMATE.
 3. PREVIOUS CLEARING AND FILLING PERMITTED UNDER SFWMD PERMIT NO. 36-03865-P AND LEE COUNTY DOS2000-00045.
 4. EXISTING CONSERVATION WASEMENT GRANTED TO THE SFWMD AND RECORDED IN LEE COUNTY, OR BK 03535 PG. 1227.
 5. THERE ARE NO JURISDICTIONAL WETLANDS, AQUIFER RECHARGE AREAS, OR RARE & UNIQUE UPLANDS LOCATED OUTSIDE OF THE CONSERVATION EASEMENT.

NO.	DESCRIPTION	DATE

DATE: DECEMBER 2013
 PROJECT NO. 20139560-000
 FILE NO. 35-48-25
 SCALE: 1" = 100'

FLUCFCS MAP

SHEET NUMBER

EXHIBIT 22 & 23

Focus Development Group Estero Apartments
Comprehensive Plan Amendment
IV. E. Request, Description, and Comprehensive Plan Consistency

Request

The Applicant seeks a small scale amendment to change the Future Land Use designation of the 8.57-acre parcel from General Interchange to Intensive Development to accommodate multifamily residential uses.

Description

The subject site is located in the northwest corner of the intersection of the exit ramp from southbound Interstate 75 and Corkscrew Road. The site is part of the Estero Interstate Commerce Park Commercial Planned Development (CPD) approved pursuant to Zoning Resolution No. Z-00-006. The site is currently approved for 60,211 square feet of retail and 7,454 square feet of restaurant by Lee County Development Order DOS2007-00066.

Uses immediately surrounding the site include commercial and hotel uses of the Estero Interstate Commerce Park CPD as depicted on the Existing Land Use Exhibit included in this application, specifically: a mid-rise hotel, gas station, tire service store, restaurants, and golf cart and ATV dealership. Corkscrew Commons Drive provides shared access to these commercial uses, as well as the Subject Parcel.

The proposed project will not place an undue burden on the existing or planned infrastructure in the surrounding area. Urban services are available in the vicinity. This location is at the interchange of I-75 and Corkscrew Road which provides significant access to destinations. The surrounding road network has appropriate capacity for the expected trip generation created by the project as analyzed in the Traffic Study accompanying this application. The project is along LeeTran Route 60, which serves San Carlos Park, Estero and Florida Gulf Coast University and links to Route 140 along US 41 and the Express Route to Gulf Coast Town Center.

Community facilities are in place and adequately serve major development in close proximity such as Miromar Outlets and Germain Arena at the northeast quadrant of I-75 and Corkscrew Road. Community facilities available and adequate to serve the project exist within proximity that could be reached by alternatives to vehicle travel due to their close proximity, including: Pinewoods Elementary School within 2.1 miles, Bonita Springs Charter Middle School within 6.9 miles, Estero High School within 2.1 miles, Estero Community Park within 1.4 miles, Estero Fire Rescue and EMS Emergency Services Station within 1 mile, and South County Regional Library less than 1 mile away.

Lee Plan Consistency

The Applicant seeks to change the Future Land Use designation from General Interchange to Intensive Development to allow the option for multifamily use. The proposed designation of the 8.57-acre site in the Intensive Development Future Land Use Category will require update to the Table 1(b) Planning Community Year 2030 Allocations to reduce the General Interchange designation by 8.57 acres and add 8.57 acres within the Intensive Development designation. The Estero Planning Community is shown to have population of 3,650 remaining to be accommodated, so the proposed change contributes to the

**Focus Development Group Estero Apartments
Comprehensive Plan Amendment
IV. E. Request, Description, and Comprehensive Plan Consistency**

population accommodation needs of Estero with a housing type of multifamily that has been evaluated and found to be needed through a professional market assessment, further described below.

Multifamily use is allowable in the CPD zoning district. A PD Amendment request is being processed concurrently with this small scale plan amendment to add the option for multifamily use on the subject property.

The multifamily use is proposed to consist of 136 rental apartment units. Current plans include 44 one bedroom units, 80 two bedroom units, and 12 three bedroom units.

The density for the subject site is proposed at 15.87 units per acre, with 14 units per acre of base density and an additional 1.87 units per acre in bonus density through contribution to the affordable housing trust fund. This proposed residential density is within the total maximum density allowable through bonuses of up to 22 dwelling units per acre in the Intensive Development Future Land Use Category.

The Estero Council Community Leaders recently commissioned the Estero Community Market Assessment (Market Assessment) prepared by Richard F. Hunt of Peloton Research Partners. The Market Assessment found that the Estero market has a limited amount of land available for multi-family rental housing (p. 15). The Market Assessment also provides that multi-family rental housing is an important housing choice for accommodating the workforce and new residents (p. 15). The proposed project will help to fill this void, thereby supporting the area's growing workforce and helping to attract new residents to the area and sustain the existing and anticipated commercial uses in Estero.

The Intensive Development Future Land Use Category is further described in Policy 1.1.2 to provide for planned mixed use centers of high density residential, commercial, limited light industrial, and office uses. The proposed Future Land Use Map amendment supports the concept of mix of uses by incorporating multifamily residential units in proximity to commercial uses.

The Mixed Use Overlay designations found on Lee Plan Map 1 (page 6 of 8) include a mixed use designation in the southwest quadrant of the I-75/Corkscrew Road interchange, immediately south of the subject site across Corkscrew Road. The subject site proposed for multifamily development within a CPD is within ¼ mile of the Mixed Use Overlay area, therefore the proposal is consistent with the intent of Policy 4.2.3 of the Lee Plan, which gives the BOCC discretion to allow mix of uses to extend beyond the Mixed Use Overlay zone up to ¼ mile.

The Lee Plan designates the site within the Estero Planning Community. The proposed project is consistent with the residential use objectives outlined in the Lee Plan for the Estero Community, particularly Policy 19.3.1, which encourages higher density residential developments with a mix of unit types between Three Oaks Parkway and I-75, which is the location of the proposed project.

Policy 19.2.6 of the Estero Community Plan also provides that "Lee County encourages...residential developments to provide interconnect opportunities with commercial areas, including but not limited to bike paths and pedestrian access ways." The proposed multifamily development will be interconnected to the existing commercial uses in the immediate vicinity using Corkscrew Commons Drive.

**Focus Development Group Estero Apartments
Comprehensive Plan Amendment
IV. E. Request, Description, and Comprehensive Plan Consistency**

The applicant provided an informal presentation to the Estero Community Planning Panel at their meeting October 24, 2013. The Panel was receptive to the project, especially as it relates to the Estero Community Market Assessment (Market Assessment) recently commissioned by Estero Council Community Leaders and prepared by Richard F. Hunt of Peloton Research Partners. The proposed project will help to fill voids in multifamily housing within Estero, thereby supporting the area's growing workforce and helping to attract new residents to the area and sustain the existing and anticipated commercial uses in Estero. Employment opportunities are also in close proximity, including the Hertz Headquarters located within 2.5 miles, which is within a reasonable distance to reach conveniently by car or bicycle.

Objective 19.1 and Policy 19.1.1 of the Lee Plan will be met through adherence to buffering, signage, and architectural regulations of the Land Development Code for projects within Estero, subject to a deviation request to allow for signage acceptable to the Estero Community Planning Panel and Lee County that serves as a community gateway feature along Corkscrew Road.

The water management system has been designed and permitted according to South Florida Water Management District Environmental Resource Permitting requirements, which ensures Objective 61.3 and supporting policies related to Surface Water Management Standards are met.

The proposed multifamily use is consistent with Housing Needs Objective 135.1 and 135.4, and Policies 135.1.4 and 135.1.9 in that a contribution to the Affordable Housing Trust Fund will be provided to support affordable housing provisions in the County,¹ and the project itself contributes a mix of housing densities and types to the Estero community.

The proposed CPD amendment is consistent with the Economic Element of the Lee Plan, specifically Policy 158.1.9, in that it will introduce multifamily housing options to support a mix of housing types, sizes, prices, and rents in a mixed use location.

Adjacent Local Government, State and Regional Policy Plan Consistency

The proposal is small scale in nature, and will not have significant impacts on the adjacent local government of Bonita Springs or on its comprehensive plan. The Bonita Springs Comprehensive Plan Intergovernmental Coordination Element provides for a coordination system that is maintained between the city and Lee County on planning and land use matters.

The State Comprehensive Plan (Florida Statute 187.201) Housing Goal is to increase affordability and availability of housing for low income and moderate income persons... while at the same time encouraging self-sufficiency of the individual and assuring environmental and structural quality and cost-effective operations. The proposed project increases the availability of multifamily housing options in an area found to need such options, and the project contributes to the Affordable Housing Trust Fund to help make housing for low income and moderate income persons more available. Environmental and structural quality has been assured through the permitting process for defining the stormwater system and land dedicated to environmental preservation within the Estero Interstate Commerce Park.

1-The applicant may use TDRs as an alternative to cash contribution to the Affordable Housing Trust Fund.(4/16/14)

**Focus Development Group Estero Apartments
Comprehensive Plan Amendment
IV. E. Request, Description, and Comprehensive Plan Consistency**

The State Comprehensive Plan Land Use Policy 1 is to enhance the livability and character of urban areas through the encouragement of an attractive and functional mix of living, working, shopping and recreation activities. The proposed change to allow multifamily units within a commercial planned development supports the intent of this Policy by allowing for residents to living in proximity to workplaces and shopping opportunities in an appropriate location where urban services are available and adequate.

The State Comprehensive Plan Public Facilities Policy 1 provides for incentives for developing land in a way that maximizes the uses of existing public facilities. The proposed project furthers this policy as it is within an urban area with existing public facilities, as explained above in the Description section.

The Southwest Florida Regional Policy Plan (SWFRPP) Affordable Housing Element Goal 1 is to supply a variety of housing types in various price ranges to ensure that all residents have access to decent and affordable housing. The proposed project increases the availability of multifamily housing options in an area found to need such options, and the project contributes to the Affordable Housing Trust Fund to help make housing for low income and moderate income persons more available. The SWFRPP Affordable Housing Element Strategy under Goal 1 is to develop livable, integrated communities that offer residents a high quality of life by: encouraging and promoting infill development in urban areas to maximize efficient use of existing infrastructure; and promoting developments that combine commercial and residential uses as a means of providing housing that is affordable and near employment opportunities. The proposed project fulfills this strategy and related actions because it is offers multifamily housing with uses immediately surrounding the site that include a mid-rise hotel, gas station, tire service store, restaurants, and golf cart and ATV dealership, as depicted on the Existing Land Use Exhibit included in this application.

**Focus Development Group Estero Apartments
Comprehensive Plan Amendment
IV. G. Sound Planning Principles**

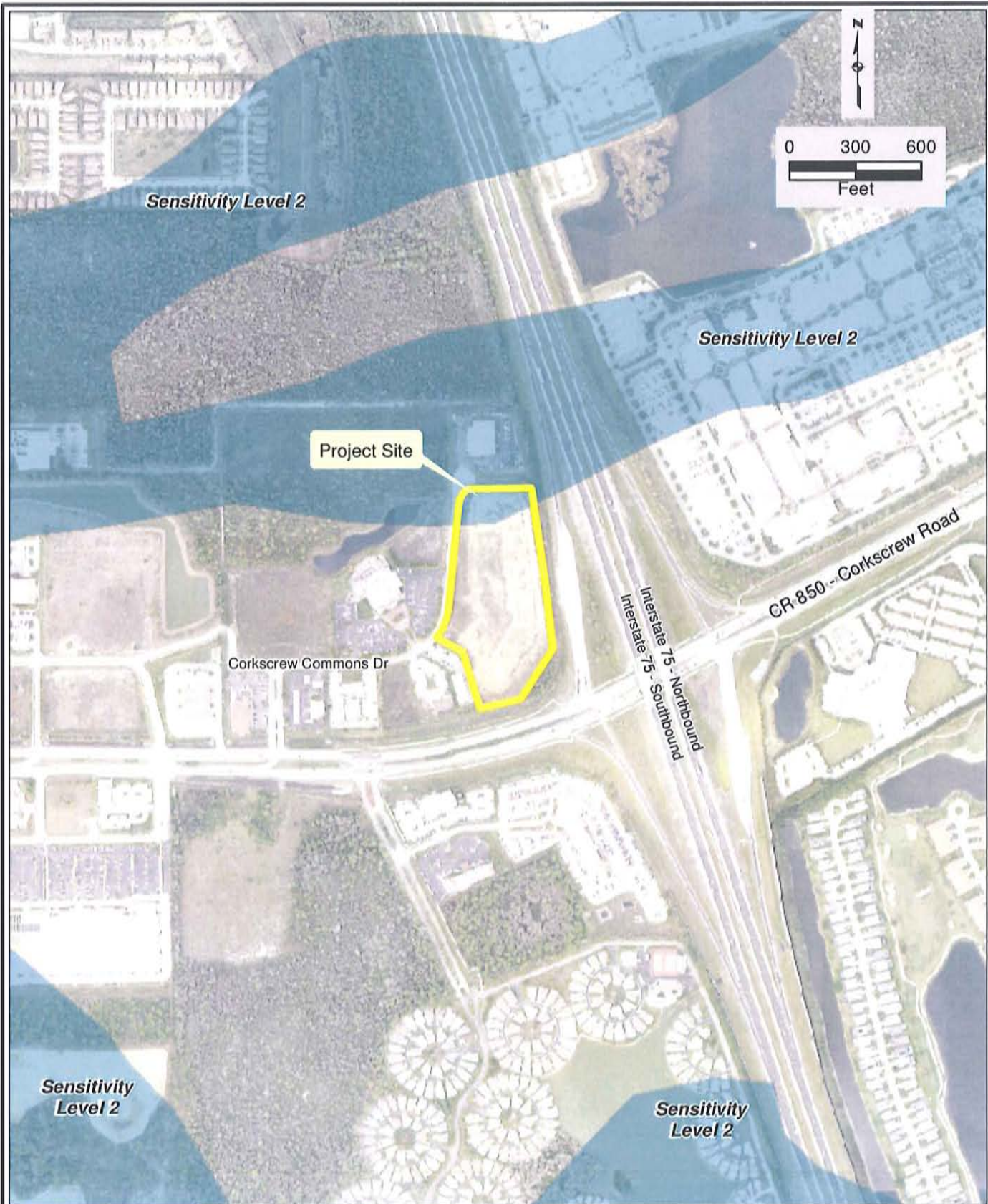
The request for a small scale amendment to change the Future Land Use designation of the 8.57-acre parcel from General Interchange to Intensive Development to accommodate multifamily residential uses within a Commercial Planned Development is supported by the data and analysis of the Estero Community Market Assessment (Market Assessment) prepared by Richard F. Hunt of Peloton Research Partners. The Market Assessment found that the Estero market has a limited amount of land available for multi-family rental housing (p. 15). The Market Assessment also provides that multi-family rental housing is an important housing choice for accommodating the workforce and new residents (p. 15). The proposed project will help to fill this void, thereby supporting the area's growing workforce and helping to attract new residents to the area and sustain the existing and anticipated commercial uses in Estero.

The American Planning Association (APA) Policy Guide on Housing (2006) asserts that in order for communities to function, there must be an adequate supply of housing in proximity to employment, public transportation, and community facilities such as public schools. The proposed project is a request to locate housing in proximity to these activities within the community. Uses that afford employment opportunities immediately surrounding the site include a mid-rise hotel, gas station, tire service store, restaurants, and golf cart and ATV dealership. Public transportation is in proximity as the project is along LeeTran Route 60, which serves San Carlos Park, Estero and Florida Gulf Coast University and links to Route 140 along US 41 and the Express Route to Gulf Coast Town Center. Community facilities available and adequate to serve the project exist within proximity that could be reached by alternatives to vehicle travel due to their close proximity, including: Pinewoods Elementary School within 2.1 miles, Bonita Springs Charter Middle School within 6.9 miles, Estero High School within 2.1 miles, Estero Community Park within 1.4 miles, Estero Fire Rescue and EMS Emergency Services Station within 1 mile, and South County Regional Library less than 1 mile away.

The APA Policy Guide on Housing further states that the housing stock of a community must include affordable and accessible for sale and rental units, not only to meet social equity goals, but in order to ensure community viability. The housing that is subject of this request is proposed as rental multifamily housing which brings diversity to the housing stock in the surrounding community, as further analyzed in the Market Assessment for Estero referenced above. By contributing to the Affordable Housing Trust Fund as proposed, the project further supports the availability of affordable housing in the County.¹

The APA Policy Guide on Smart Growth (2012) puts forth core principles that are recognized as supporting an approach to growth and planning that delivers dynamic attractive communities with greater choices for consumers, as well as a powerful tool for farmland, open space and habitat preservation. The core principles include providing for efficient use of land and infrastructure, and a greater mix of uses and housing choices. The proposed land use change is in an urban service area where residents can avail themselves of available and adequate infrastructure, while integrating the use of housing in close proximity to commercial establishments that serve as workplaces, and convenient sources of goods and services that can be accessed via car, public transportation, by foot or by bicycle. This proposed change is consistent with the definition of Smart Growth that the APA supports and endorses as a sound planning principle, because it provides choices in housing, in transportation, in jobs and in amenities.

1 - The applicant may use TDRs as an alternative to cash contribution to the Affordable Housing Trust Fund. (4/16/14)



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NOTE: Aerial shown is from Lee County dated Jan 2013.
Sensitivity data taken from Lee County Planning GIS dataset.

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Estero Apartments
Lee County Archeological Sensitivity Map

DATE	PROJECT	FILE NO.	SCALE	SHEET
12/9/2013	20139560	00-00-00	As Shown	1



This record search is for informational purposes only and does NOT constitute a project review. This search only identifies resources recorded at the Florida Master Site File and does NOT provide project approval from the Division of Historical Resources. Contact the Compliance and Review Section of the Division of Historical Resources at 850-245-6333 for project review information.

December 5, 2013



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(954) 626-0123 office
rmodys@johnsoneng.com

In response to your inquiry of December 5, 2013 the Florida Master Site File lists no archeological sites and no other cultural resources found in the following parcels of Lee County:

Section 35, Township 26, Section 25 submitted with search request.

When interpreting the results of this search, please consider the following information:

- **This search area may contain *unrecorded* archaeological sites, historical structures or other resources even if previously surveyed for cultural resources.**
- **Federal, state and local laws require formal environmental review for most projects. This search DOES NOT constitute such a review. If your project falls under these laws, you should contact the Compliance and Review Section of the Division of Historical Resources at 850-245-6333.**

Please do not hesitate to contact us if you have any questions regarding the results of this search.

Sincerely,

Eman M. Vovsi
Historical Data Analyst
Florida Master Site File
EMVovsi@DOS.MyFlorida.com



SEGMENTATION ANALYSIS
FINANCIAL MODELING
FEASIBILITY STUDIES
MARKET RESEARCH
DESIGN TESTING

ESTERO COMMUNITY MARKET ASSESSMENT Prospects for Future Commercial Development and Economic Development Opportunities

Prepared for:

**Mr. Nick Batos
Chairman
Estero Council of Community Leaders (ECCL)
Box 424
Estero, Florida 33929**

Prepared by:

**Richard F. Hunt
PELTON RESEARCH PARTNERS**

September 16, 2013

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COMMUNITY OF ESTERO
MARKET OPPORTUNITY ASSESSMENT
LEE COUNTY, FLORIDA
SEPTEMBER 2013

September 16, 2013

Mr. Nick Batos
Chairman
Estero Council of Community Leaders (ECCL)
Box 424
Estero, Florida 33929

Dear Mr. Batos,

Per your request and on behalf of your client, the Estero Council of Community Leaders (ECCL), PELOTON RESEARCH PARTNERS (*PELOTON RESEARCH*) and Seth Harry & Associates (SHA) have conducted a market study to assess the potential market demand for new retail, office, and residential uses to help determine the land needed to support these uses within Estero in the future. This study has been undertaken to provide ECCL relevant data and findings to further support their current and future long-range planning efforts for the community of Estero in conjunction with comprehensive planning efforts in Lee County.

The information provided in this study is built on previous research and planning work conducted by SHA and PELOTON RESEARCH to assess larger-scale economic and market opportunities within Lee County. Findings from the earlier Lee County assessment have helped guide a more detailed examination of the unincorporated community of Estero. Key market and community characteristics were analyzed including: local resident demographics, household income levels, retail sales, consumer buying power, local employment, residential neighborhoods, retail centers, office spaces, and real estate market conditions, among others. Many of these characteristics are compared with those of other Lee County communities, including Bonita Springs and Fort Myers, as well as with Lee County overall. Additional comparisons are made with the City of Naples and Collier County to the south.

The following report summarizes the findings of the market investigation conducted by PELOTON RESEARCH and SHA during the months of May, June, and July of 2013. The market investigation included a review of historical development trends in Estero and greater Lee County prior to 2000. Special consideration has been given to the impacts of local economic conditions stemming from the national recession during 2008 through 2009.

MARKET RESEARCH
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This report is separated into five (5) primary sections summarized as follows:

Main Report

- *Section A - Introduction* – this section provides an overview of the study process used by PELOTON RESEARCH;
- *Section B - Executive Summary* – this section provides a summary of key findings from the Estero market study with an assessment of the Strengths, Constraints, and Opportunities discovered for the community. The section additionally includes a summary of national, state, and regional trends that will influence the future growth and development in Estero;
- *Section C – Demographics, Employment, & Future Growth* – this section provides historical, current, and projected statistics on demographics, employment, and job growth for Lee County, Estero, and select geographic areas;
- *Section D – Commercial Real Estate Markets, Retail Demand, and Land Use* - this section provides an assessment of current commercial and retail real market conditions, current and projected retail demand, and implications of future demand for space by type on future land use needs in the community of Estero; and
- *Section E – Prospects for Multi-District Downtown Estero* – based on the findings from the previous sections and a review of vacant mixed-use properties along US-41, the prospects for a multi-district town center for Estero is reviewed. The potential opportunity is reviewed as a comprehensive development program to capitalize on the changing demographic and economic characteristics within the local market that would strategically position the community for greater economic stability and resilience in the future.

Appendices

- *Estero Community Overview* – this section highlights the history of Estero and an overview of some of Estero’s 38 neighborhoods and community features;
- *Estero’s Schools* and their performance indicators are highlighted and summarized;
- *Demographic & Economic Characteristics* – this section of the report provides a summary overview of current and historical demographic and economic

activity in Southwest Florida with special emphasis on trends in the community of Estero. Current and projected demographic characteristics for Lee County and Estero are provided with comparative data provided for the City of Bonita Springs, City of Fort Myers, Collier County, and the City of Naples. Local employment activity and Lee County's largest employers are summarized;

- *Building Industry Activity* - this section provides an overview of building and permit activity in the Greater Estero market area and includes historical and current building trend information for communities in Lee and Collier Counties as well as the counties overall;
- *Real Estate Markets* – this section provides an overview of activity in the residential, office, and retail markets of Estero and selected surrounding market areas. Local sales and listing statistics, prices, and trends are provided across the residential market sector. A survey of available spaces and vacancy rates are provided for the commercial sector in the community of Estero; and
- *Commercial Property Listing Survey* – this section provides a comprehensive list of commercial properties listed for-sale and for-lease in the Estero market area.

This report summarizes the findings from our market assessment of the Greater Estero economy and local real estate market sectors. Based on our findings, the prospects for new development in the Estero market are positive for most residential market sectors in mid-year 2013 with continuing improvement expected through 2014. The retail and office market sectors are not expected to see substantial improvements until after 2014, though select opportunities still exist in underserved market segments.

Seth Harry & Associates will use the information provided in this study to conduct an additional evaluation of the potential building capacity and design implications for a centralized Estero community development, in addition to their assessment of the changes in development patterns that will occur with transitioning land uses in Estero.

Thank you for the opportunity to assist you with an Estero market assessment.

Sincerely,

Richard F. Hunt | Principal
PELTON RESEARCH PARTNERS

Seth Harry, AIA | President
SETH HARRY & ASSOCIATES

A. INTRODUCTION

STUDY OVERVIEW

The following study provides market research findings to support the comprehensive planning efforts of the community of Estero being led by the Estero Community Planning Panel (ECP) and the Estero Council of Community Leaders (ECCL). The primary focus of this market study is the prospects for future real estate development in Estero based on local economic performance, demographic characteristics, and projections for growth within Estero and surrounding communities within both Lee and Collier Counties. Future population and job growth in Estero will have the greatest impacts on the demand for land use. This study provides findings on the expected shift in the amount of zoned land needed by future use.

The following main sources were used as part of this market investigation:

- National migration data into Lee County was gathered from the U.S. Census, the Internal Revenue Service, and the University of Florida Bureau of Economic and Business Research (BEER).
- Geo-demographic data and population estimates were gathered from the U.S. Census, Environmental Systems Research Institute (ESRI), Claritas, BEER, and the State of Florida Office of Economic & Demographic Research.
- Retail Sales and consumer spending data for Lee and Collier Counties for the time period 2003 to 2013 was gathered from ESRI, the State of Florida Department of Revenue, and the Bureau of Economic Analysis.
- Local business data was provided by the national firm Dun & Bradstreet along with data provided by local business owners.
- Local and regional economic data was gathered from the Regional Economic Research Institute at Florida Gulf Coast University and the Fort Myers Regional Partnership.
- Residential, retail, and office space listings were provided by numerous local and regional associations, individual real estate brokerage firms, and homebuilders including but not limited to: the Realtors Association of Fort

Myers and The Beach, Downing-Frye Realty, John R Wood Realtors, Pulte, Lennar, Toll Brothers, Premier Commercial, Cushman & Wakefield, CRE Consultants, Colliers International, Lee & Associates, and Avison Young.

- Previous planning studies were obtained and reviewed from the Lee County Planning Department and the Estero Community Planning Panel (ECPP) website.
- Background data and research support was provided by Ruth Landsman, Partner, Seth Harry & Associates.
- PELOTON RESEARCH additionally relied on 26-years of professional experience working in real estate market analysis and economic development to conduct the market assessment for the community of Estero.

By utilizing the data gathered from these various sources, PELOTON RESEARCH and SHA were able to analyze the current economic conditions in the Estero market along with the market context for various real estate uses in the community. This information has been applied to long-range planning efforts to determine whether currently proposed land uses are in-sync with current and projected market demand.

The following section provides an executive summary of findings including an analysis of strengths, constraints, and opportunities relevant to future development in the Estero Planning Area.

B. EXECUTIVE FINDINGS

Strengths, Constraints, and Opportunities

The Estero community has benefitted greatly from careful planning over the past decade. Because of this the community has weathered a major national recession with a minimal amount of negative economic impact when compared to other markets in the State of Florida. Estero has significant strengths and opportunities moving forward that need to be considered. Equally important are some of the constraints the community needs to overcome to reach more sustainable growth and development.

The following is a summary of the strengths, constraints, and opportunities identified in Estero during this market study.

STRENGTHS

Strong population growth – *Estero has experienced rapid population growth since 1990, and is expected to continue to grow at a higher than average rate versus Lee County overall.* The Estero Fire District grew 144% from 2000 to 2010, from a population of 9,261 to 22,612, or a net increase of 13,351 new residents. This population growth exceeded that of Bonita Springs which added 11,117 residents during the same time period.

Based on an analysis of residential permit activity from 2000 through 2012, PELOTON RESEARCH has determined that substantially higher growth occurred in Estero than that reported by the U.S. Census during 2010. The analysis reveals real population growth in Estero from 2000 to 2010 was 5,597 more than that reported by the Census. A total of 26,723 part-time and year-round residents were added to Estero from 2000 to 2010. This puts the “in-season” population of Estero in 2010 at 40,301. These figures are very important when assessing the economic potential of the community in the future.

Excellent roadway network and highway access – *Estero benefits greatly from a location along an interstate and highway corridor. Interstate 75 and Highway 41 provide strong economic benefits for local businesses, drawing customers from North Lee County and Collier County.* Residents benefit from easy, convenient access to employment and shopping. Future development between Highway 41 and I-75 will benefit from visibility along the corridors. Improvements over the past decade include the addition of twelve (12) north/south lanes due to the addition of roadways and the widening of existing roadways. Some key roadway improvements are noted as follows:

- I-75 widened from 4 lanes to 6 lanes, and Hwy. 41 widening to 6 lanes to be completed by September 2013.
- The 4-lane Via Coconut Point roadway completed prior to Coconut Point opening in 2005 from Corkscrew Road to Pelican Colony Boulevard.
- Estero Parkway was extended with 4 lanes from Three Oaks Parkway to Ben Hill Griffin Parkway.
- Three Oaks Parkway was constructed as a 4 lane road south of Corkscrew Road to the Bointa Springs boundary in 2003 and widened to 4 lanes north of Corkscrew a couple of years later.

Close proximity to growing international airport – *The proximity to Southwest Florida International Airport is important for both business and tourism success.* The airport continues to show increasing traffic and usage levels. During July of 2013, a total of 467,946 passengers traveled through the airport. Traffic through July of 2013 is 5.9% higher than that of the same period in 2012. The airport served a total of 7.3 million passengers in 2012. The airport is served by major airlines including Delta, U.S. Airways, JetBlue, and Southwest Airlines. Alico Road and Daniels Parkway provide access to the airport from either Hwy. 41 or I-75. Three Oaks Parkway and Ben Hill Griffin Parkway also provides access north to the airport from Estero.

Centralized location – *The Estero community is well-located in a centralized location in Southwest Florida between the cities of Fort Myers and Naples.* The community is also centrally located in South Florida near equidistance from the major cities of Tampa to the north and Miami to the southeast. Both cities are an approximate 2-hour drive from Estero by automobile.

Highly desirable recreational opportunities and natural resources - *Coastal access, beaches, Koreshan State Park, and the attractive Estero River make for a highly-desirable recreational environment in Estero.* The state park and Estero River are located in the center of the community and provide opportunities to further enhance the surrounding public spaces. The Estero community is well-known as a highly-attractive lifestyle community.

Ability to attract a Fortune 300 corporation – *Estero will soon be home to the Fortune 300 Hertz Company (ranked 292 in 2013).* The new headquarters will be located on a 34-acre parcel on the southeast corner of Williams Road and Hwy. 41. The implications of this relocation will be highly-positive for economic development efforts in both the

short-term and long-run. The company is expected have 700 employees with average annual incomes above \$100,000 with some existing workers relocating into Estero. Hertz is additionally expected to hire new employees from within the surrounding market area. The company is planning to build a total of 450,000 square feet in two buildings. The first phase of the facility, the 300,000 square foot headquarters building, is expected to be completed in 2015. The total economic impact of the Hertz relocation into Estero is estimated at \$68 million.

Well-planned communities and neighborhoods – *Estero has a reported 38 identifiable communities, most with organized associations.* An estimated 35 of these communities are part of the ECCL which, along with the ECPP, guides planning, community development and growth management in the Estero area. So much of Estero's new development occurred over the last fifteen years, and the majority of housing stock is newer than that of surrounding market areas.

Development review process and standards – *Estero has a reputation as a highly-organized and active community with engaged leadership to guide the development review process within the community.* The result of this active involvement and guidance has been higher-quality development standards that have resulted in higher-quality developments and higher property values.

As noted on the Esterofl.org website, Estero is the only community in Southwest Florida where residents have so many opportunities to influence the use and appearance of each of its development projects. The first opportunity is at property zoning before the filing of a zoning application. The Estero Community Planning Panel (ECCP), created in 2002, holds public meetings to allow residents to support or oppose features of a developer's plans. The other opportunity for public participation is arranged prior to an application for a Development Order (DO) by the developer. The Estero Design Review Committee (EDRC) holds public meetings to review design, site planning, architecture, parking, access, and other issues, with all of the findings submitted in a report to the county to help guide the approval process. All of this oversight has led to the approval of more attractive and better planned projects that reflect the influence and support of local residents.

Proximity to major university – *Estero benefits from very close proximity to the Florida Gulf Coast University (FGCU), a fast growing institution of higher-education that brings positive direct and indirect economic impacts to the surrounding market area along with life-long learning opportunities to enrich the lives of local residents.* With a growing

student body of over 12,000 students and projected enrollment of 24,000 in the future, FGCU is a major economic asset for the community. Estero's immediate proximity will permit it to benefit from FGCU's growth.

Estero resident demographics – *The individuals that comprise the Estero population have higher than average levels of education when compared with those in the State of Florida and Lee County overall.* The community also has significantly higher median household incomes, even with household sizes that are significantly smaller than average. Lee County's average household income was \$65,205 in 2012 versus \$86,923 for Estero. A total of 24.7% of Lee County residents have a Bachelor's degree or higher-level degree, while 39.8% of Estero's residents have a Bachelor's degree or higher. Estero's part-time residents and those recently moving to the area have even higher overall percentages of Bachelor's degrees or higher.

Local pool of talent – *Along with higher education levels, the local resident population is comprised of many members who have successful business, professional and organizational experience.* This pool of talent has been tapped for the oversight of local community development and could be further tapped for local business development.

Large regional retail centers – *One of the strongest components of Estero's local economy is the presence of larger retail centers that qualify as regional centers serving a broad market area.* Miromar Outlets and Coconut Point Mall aided substantially in the creation of a retail-based economic engine in Estero. Total retail sales in Estero approached \$810 million in 2012, with these two centers contributing 76% of total Estero retail sales during the year. These retail centers are considered major community assets that greatly enhance the community for residents and visitors. A new 185,000 square foot Wal-Mart is set to be built at the northeast corner of Hwy. 41 and Estero Parkway. The project is due to begin after the completion of the Hwy. 41 road widening to 6 lanes late this year or early in 2014.

Proximity to the Research and Enterprise Diamond – *Nearby land is available for companies seeking industrial lands, especially those companies operating in research and development industries.* The Research and Enterprise Diamond is an economic development zone established in Lee County over an approximately 40 square mile area. The zone includes Southwest Florida International Airport, JetBlue Park and Florida Gulf Coast University and stretches south to the Miromar Outlets. The focus of the zone is the attraction of high-quality, clean-industry businesses, along with the attraction of complementary residential and retail uses to support residents, employees, and

students. The following map shows the boundary lines of the 1,100-acre Research and Enterprise Diamond.



CONSTRAINTS

Over 30% of Estero's population is comprised of part-timer households – *With 30% of the population not present for more than six months per year, Estero does not operate at full economic capacity.* That said, the annual retail sales at major retail centers in Estero don't show significant negative impacts from this less than year-round population. This is in large part due to the ability of these centers to draw retail sales from surrounding market areas. Nonetheless, future major retailers will want to see a higher-percentage of year-round residents to help offset the increasingly competitive retail environments of Lee and Collier Counties.

Limited employed local labor force – *The demographics of Estero, with a high percentage of residents aged 65 and over, limits the number of residents considered in the labor force.* According to the Census Department, over 50% of households in Estero reported no workers present. These factors are combined with the limited number of industries currently operating in Estero. The presence of Hertz in the community will help create a higher number of desirable local jobs with good annual wages.

Over-reliance on construction industry employment – *Like many Florida communities, Estero relies heavily on the success of the construction industry to support a substantial percentage of local industry employment.* The pace of construction may reach pre-recession levels again over the next few years, but the cyclical nature of the construction industry makes the increased diversity of industries in Estero more important. As the community reaches build-out over the next two decades, there will be less demand for construction employment.

Lack of a central downtown – *Estero has 38 communities, but lacks a centralized downtown.* Currently, the areas surrounding Miromar Outlets and Coconut Point Mall represent primary local business districts. And though Coconut Point Mall was originally referred to as the *Town Center at Coconut Point*, neither of these community centers is considered the core of Estero. The establishment of a central downtown in Estero would help the community create a distinct identity and would provide another draw for both local residents and visitors to the area.

Limited rental housing – *Aside from a few older rental housing complexes in the market, Estero relies primarily on individual owners to provide rental housing in the market.* This is partly due to the conversion of for-rent projects into for-sale properties during the

boom years prior to 2008. Some homes offered for-sale were temporarily converted to rentals over the past five (5) years. As the market improves these units could convert back to for-sale. A significant amount of rental housing should be offered in the community to provide housing for working couples, singles, and retirees. The availability of quality rental housing is important for a community looking to provide workforce housing. This is an important factor for businesses looking to relocate or establish a presence in local markets.

Limited housing available to ageing seniors – *Estero has no shortage of high-quality, amenity-rich neighborhoods offering housing for active seniors, though the community appears to have limited housing available for those who are less active or in need of assisted-living.* Given the substantial population aged 65 and over, future planning for housing in Estero should include more emphasis on continuing care, assisted-living, and Alzheimer’s facilities. Additional emphasis should be placed on housing for older single residents, especially housing for older single females. All of these factors are important for a community looking to promote ageing in place.

School choice and teacher pay – *Market perceptions indicate Lee County has limited school choice when compared with Collier County.* This has resulted in younger families with children choosing to purchase in Collier County for the option of school choice, even if there is no guarantee their children will get to attend their school of first choice. Recent media reports have also indicated that Lee County is having a hard time holding on to teachers due to higher pay being offered in Collier County. These issues need to be investigated more fully and mitigated where possible. The attraction of family households is of importance to help balance future growth in Estero.

Lack of an acute care hospital – *The Estero population relies heavily on hospital facilities that are not located within the community.* These facilities, located in Fort Myers and Naples, are in excess of 10 miles away. Given the expected population growth of Estero and the percentage of the population aged 55 and over, the community is at a disadvantage without a local hospital facility. The presence of quality medical facilities is important to attract the Baby Boomer and young family market segments, and is equally important to attract new business development. Aside from school quality, the existence and quality of medical facilities is a key consideration by business owners with employees.

Limited control over community boundaries – *Aside from the local planning and development guidance provided by the ECCL and the ECPP, Estero has limited control over community boundaries.* Recent threats by neighboring Bonita Springs to annex unincorporated areas within the Estero planning area demonstrate the need for more control. Estero’s review of incorporation options is a major step to gain control of community boundaries and future fiscal management.

Large inventory of available office space – *Estero has a substantial amount of vacant office space available for-lease with vacancies in excess of 20% in some market segments.* Though this would appear good from the standpoint of attracting new businesses, much of this space is oversized relative to smaller business demand. Ample sites do exist for new office development on a build-to-suit basis.

Land over-zoned for retail uses – *Based on an assessment of current and future demand for new retail uses in the Estero market, the community has been determined to have an over-abundance of land zoned for retail uses.* Future population growth and increased tourism is expected to provide future demand for less than 1 million square feet of new retail/commercial space over the next 20 years. Using an average ratio of 4-to-1 for the amount of land needed to support future retail buildings, all future retail development would result in the need for approximately 92 acres of future retail-zoned land demand. The amount of land needed would be lower if future retail was built more densely or as part of mixed-use development.

Potential shortage of residential land to support future growth – *The return of a strong growth rate in Estero over the next decade could lead to a shortage of available residential land for new development.* If Estero was to grow by another 8,000 to 10,000 year-round and part-time residents over the next 10 years, there would be a need for at least 800 to 1,000 residential acres. At an average household size of two persons per residence, a minimum of 4,000 new units would be needed to support population growth of 8,000 residents. At a residential density of 4 units per acre, a minimum of 1,000 acres would be needed. A housing demand analysis conducted by PELOTON RESEARCH PARTNERS as part of this report reveals that 832 acres of residential land may be needed by 2020, if new residential development is provided at 4 units per acre.

OPPORTUNITIES

Ample commercial land available for rezone – *Estero has land zoned for approximately 6.5 million square feet of retail and commercial space. Approximately 3.5 million square feet of retail space currently exists in Estero and over 3 million additional square feet are zoned. Projected demand is for less than 1 million square feet of retail and commercial space, including 185,000 square feet to be attributed to a new Wal-Mart in 2014.* A portion of this excess retail land can be converted to residential uses to support projected future household growth in Estero. (See Estero Future Retail Demand for further information).

Properties are available to accommodate a Downtown – *A current review of land available for-sale in Estero revealed significant property listings along the Highway 41 and Interstate 75 corridors. Several properties, located between Estero Parkway and Coconut Road, are currently approved for larger-scale mixed-use developments. One property located along South Tamiami Trail and Broadway is being marketed as “Downtown Estero”. The 35-acre site is planned for a combination of retail, restaurant, office, residential uses (310 units in a 4-story format), and a senior-housing component (90 to 160 beds). Other notable listed properties in various stages of planning include the following:*

- Estero Greens – 10.2 acres
- Coconut Trace – 24 acres
- Estero on the River – 88 acres
- North Point – 102 acres
- Estero Town Center (Via Coconut Point) – 34.5 acres
- Galleria at Corkscrew East & West – 9.9 and 11.4 acres
- Coconut Crossing – 46 acres (not currently listed)
- Halfway Creek – 10 acres (approximate)
- Camargo (North Parcel) – 11 acres

These properties, collectively comprising nearly 350 acres, provide a potential opportunity for a comprehensive planning effort to develop a centralized Downtown area.

Land available for a new hospital – *In 2004 Lee Memorial Hospital System (LMHS) purchased 30 acres of land in the south Village of Coconut Point just south of the Dillard’s department store. This site is in close proximity to the Coconut Point Mall and the new*

Hertz headquarters. The medical facility has the opportunity to be incorporated into a Downtown Estero plan as the catalyst of a new medical district in the community.

Land available for a continuing care facility – *Based on reviews of land availability in Estero, there is significant land available for the creation of continuing care facilities.* These facilities can span the range of care from limited assisted-living to year-round care. An existing facility includes the Life Care Center of Estero located on Williams Road. The facility includes 155 certified beds and 144 year-round residents receiving various stages of care.

The demographics of Estero clearly support the inclusion of these facilities in the community. By 2017, 14.5% of the population is expected to be 75 years of age or older, and a substantial 46.3% will be 65 years or older. Over 26% of the population lives alone in Estero and the figure is much higher for the elderly, especially within the female population.

Land is available for multi-family rental housing – *The Estero market has a limited amount of land available for multi-family rental housing, an important housing choice for accommodating the workforce and new residents.* There is land available in Estero for new multi-family housing in appropriate locations. The proposed corridor of an Estero Downtown has several major properties with the ability to support new multi-family housing both for-rent and for-sale.

Hertz relocation to Estero – *The establishment of the Fortune 300 Hertz headquarters in Estero could be a major catalyst for future business development in the community.* The economic development community should continue efforts to capitalize on the future presence of this facility, highlighting the reasons this major corporation chose the high-quality community of Estero for their homebase. Estero should seek to fill in the open lands around the Hertz facility with activity centers that attract new high-quality development to increase the desirability of the area and benefit future employees and residents.

Potential opportunity for executive offices and corporate apartments – *Estero continues to establish itself as a friendly place to conduct business in a lifestyle community.* There is an opportunity to provide executive office suites for business owners seeking temporary office spaces for employees, visitors, and subcontractors. Regus International is a potential choice as an operator. They have over 1,500 locations worldwide in 100 countries with a growing membership. The closest Regus executive office location is in Sarasota, over 70 miles away. An independent operator in Estero

may be able to provide very similar services in an existing office building. An additional opportunity exists for corporate apartment facilities that provide extended stay options for visiting employees. Extended stay facilities continue to be the fastest growing segment in the hotel industry, but corporate apartments are often overlooked as a complementary option.

Baby boomer retirement growing – *The leading edge of Baby Boomers turned 65 in the depths of a national recession, forcing many to delay retirement.* An increase in retirees is expected over the next decade as the largest demographic group continues to reach retirement age. The tail end of the Baby Boomer population will reach 65 years of age in 2030. Estero should continue to see strong growth in new part-time and year-round residents from this market segment.

Economic growth to drive family growth – *Southwest Florida is experiencing stronger economic growth and the potential for continued job growth.* Both Lee and Collier Counties were recently ranked two of the three fastest growing counties in the State of Florida. For younger couples, singles, and families, new job growth drives the demand for new housing. Estero can capitalize on the economic growth by capturing housing demand deriving from these important market segments. Bella Terra, a 1,900 home community located in East Estero and developed by Lennar Corporation, has demonstrated strong market support for housing catering to families. This housing development has also demonstrated the feasibility of providing more limited amenities such as a 7,000 square foot pool, playground, fitness center, and 7,000 square foot clubhouse.

KEY CONCLUSIONS – THE FUTURE OF ESTERO

Though this study included a comprehensive review of economic activity in Southwest Florida and Lee County, the key findings of this study are being used to support the future planning and development of the Estero community.

The Estero community is fortunate to have so many community members who care about the community's future and who play an active role in planning the community's future. The results are a very attractive and desirable community to live. Growth trends over the past decade reveal the success of the community stemming from careful and thoughtful planning.

The following is the summary of the most important findings and recommendations for Estero moving forward.

- 1) **Future Land Use Changes** – Moving forward, Estero has some key land use issues that need careful attention in the near future. Estero appears over-zoned for retail and commercial uses given the projected future population growth, business growth, and potential demand.
- 2) **Business and Job Growth** – By 2015, Estero will be home to the Hertz Corporation and an associated 700 new jobs in the community. The economic impacts of Hertz’s relocation to the community will have an estimated \$68 million economic impact. As importantly, the presence of Hertz will allow the community to capitalize on the presence of a Fortune 300 corporation. This will be an important catalyst for future economic development efforts. Estero has a substantial amount of existing vacant office space that needs to be filled by the presence of new or expanding local businesses.
- 3) **Adequate Medical Services** – Estero is currently lacking an adequate level of medical services to support the year-round and part-time population of the community. This inadequate level of service will become an even more significant issue with the growing population, especially those aged 55 and over, projected to arrive to the community over the next decade. Additionally, the lack of adequate acute medical care will place Estero at a competitive disadvantage when new residents and businesses evaluate Estero for relocation relative to surrounding communities.
- 4) **Downtown Estero** - A long-term planning strategy for Estero should include the identification and development of a centralized community core. This community core should be easily identifiable as “Downtown” Estero. As part of the recommendations at the end of this study, PELOTON RESEARCH has identified geographic areas within the Estero community that provide potential locations to support a centralized community development. These prospective areas provide positive attributes and locational characteristics to support a range of uses needed to comprise a multiple block Downtown development.

C. DEMOGRAPHICS, EMPLOYMENT, AND FUTURE GROWTH

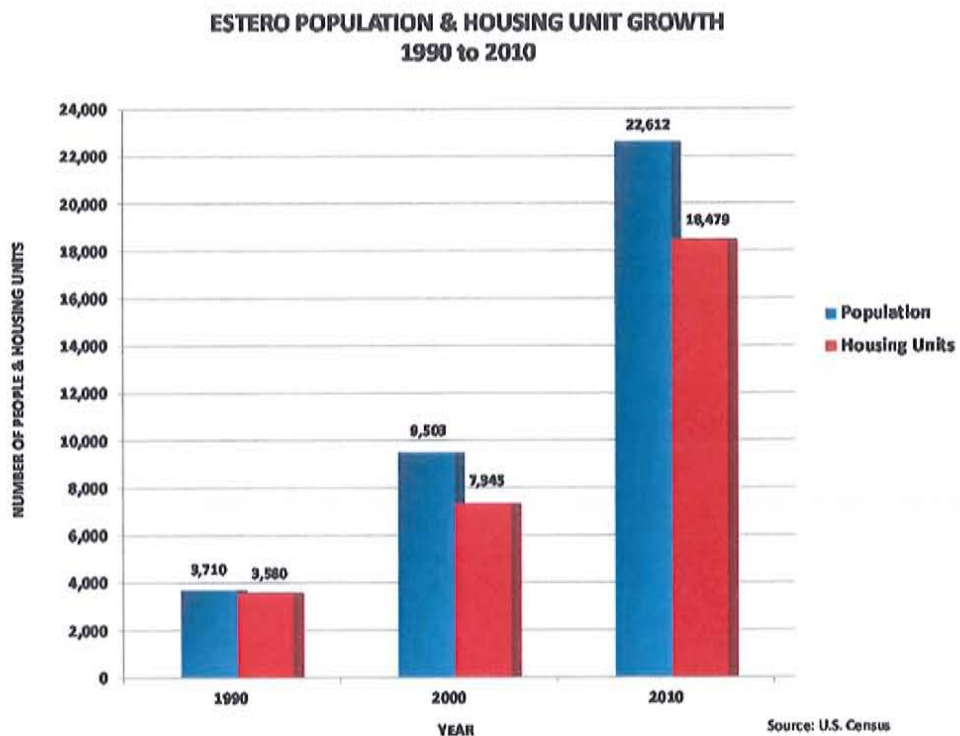
This section covers a broad range of topics including local demographics, future household growth, employment and job growth in Lee County, Estero, and other selected geographic areas.

ESTERO POPULATION & AGE GROUPS

Over the past two decades the Estero community has become known for its rapid growth and a high concentration of residents aged 55 and above. Estero experienced astounding growth from 1990 to 2010, increasing population in its Census designated boundaries from 3,710 to 22,612 for a net permanent population gain of 18,902 based on Census estimates. Along with the rapid population growth came the strong growth in new housing units.

Estero had 3,580 housing units in 1990 with nearly 53% considered vacant or seasonal, and 63.2% of all housing units comprised of mobile homes. By 2010, Estero had 18,479 housing units with 7,213 units less than full-time occupied. The total increase in housing units over the 20-year period was a minimum of 14,899 units, or a total unit increase of 316% in just two decades.

The year-round population of Estero grew 156% from 1990 to 2000 and another 138% from 2000 to 2010. By comparison, Lee County grew 31.6% from 1990 to 2000 and 40.3% from 2000 to 2010. Both Lee County and Estero grew at a more rapid pace than the State of Florida overall. The following chart show the population and housing unit growth of Estero from 1990 to 2010. These are Census-based figures only. These figures most likely underestimate the real population growth in Estero (see Estero Population and Housing Growth).



Estero's population growth has been primarily driven by new residents aged 65 and older since 1990. Most often, new households include retirees from other market areas, such as the Midwestern portion of the U.S. Every year a number of part-time residents who already keep a residence in Estero convert to year-round residents, thereby adding themselves to the population count for the community. Estimates from previous Census years showed that between 30% and 37% of Estero housing units are occupied on a part-time basis. There is a tendency to underestimate the impacts of part-time residents on the need for services in the area. At the same time, there is a tendency to underestimate the positive economic impacts the part-timers have on the local economy. (See Estero Estero Retail Demand for more on this topic.)

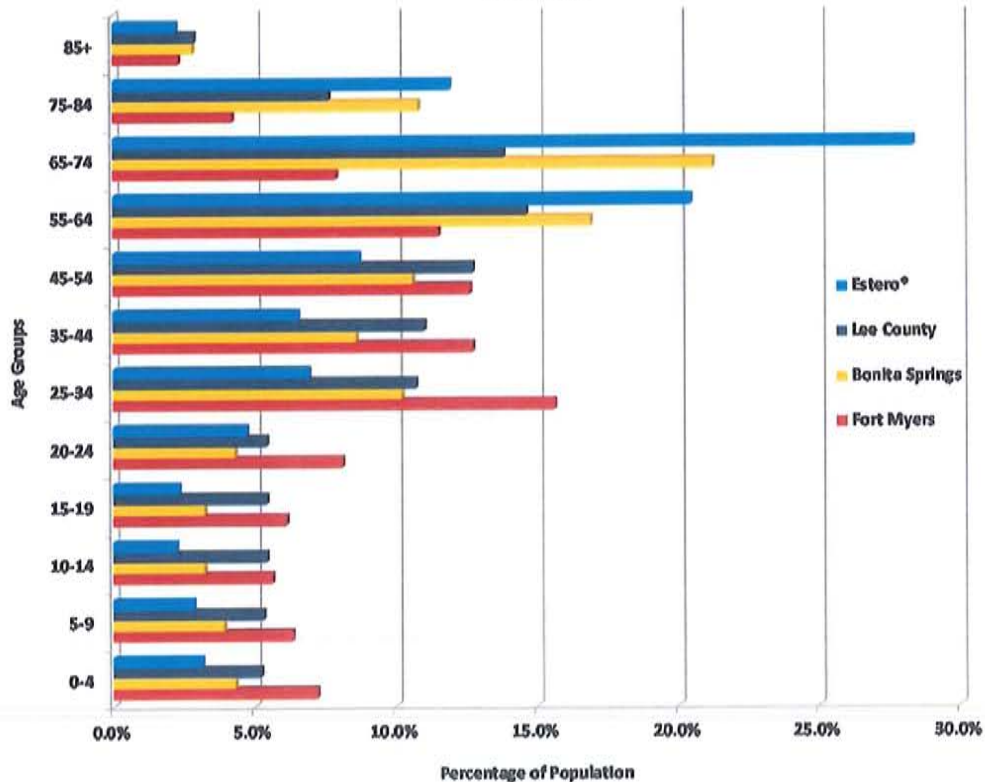
The year-round 65 and older household segments in Estero are projected to continue to be the most dominant age groups in Estero for the foreseeable future. The following charts show the 2012 breakdown of age groups in Estero compared with the age group breakdown in the Cities of Fort Myers and Bonita Springs and Lee County overall.

POPULATION BY AGE GROUP 2012
For Selected Geographic Areas

Age Groups	GEOGRAPHIC AREA			
	Estero CDP*	City of Fort Myers	City of Bonita Springs	Lee County
0-4	3.1%	7.2%	4.3%	5.2%
5-9	2.8%	6.3%	3.9%	5.3%
10-14	2.2%	5.6%	3.2%	5.4%
15-19	2.3%	6.1%	3.2%	5.4%
20-24	4.7%	8.1%	4.3%	5.4%
25-34	6.9%	15.6%	10.2%	10.7%
35-44	6.5%	12.7%	8.6%	11.0%
45-54	8.7%	12.6%	10.6%	12.7%
55-64	20.4%	11.5%	16.9%	14.6%
65-74	28.3%	7.9%	21.2%	13.8%
75-84	11.9%	4.2%	10.8%	7.6%
85+	2.2%	2.3%	2.8%	2.8%
Total =	100%	100%	100%	100%

* Estero Census Designated Place Only. Does not include part-time population or greater Estero Planning Area.
 Source: U.S. Census; InfoGroup; Claritas; and Peloton Research Partners

AGE GROUP DISTRIBUTION BY GEOGRAPHIC AREA
Estero, Lee County, & the Cities of Fort Myers & Bonita Springs
Year 2012



The light blue bar in the previous chart shows how dominant the 55 to 74 year old age group is in Estero, and how much more dominant this group is in Estero versus the other geographic areas. The impacts of this population distribution leads to a higher overall median age for the Estero community compared with the other areas.

Year	Estero	Fort Myers	Bonita Springs	Lee County
2012	62.1	35.9	56.2	46.3
2017	63.7	36.9	58.8	48.1

The following table shows the distribution of population by age group in 2012 and the forecast for 2017. Based on these figures, the Estero population will see the largest increase in the 55 and above age groups, with a total increase of 42.8% by 2017. The groups aged 55 and above all see positive growth to 2017, while various age groups aged 54 and under see negative growth. The largest decline will occur with the population aged 20 to 24. This trend may be reversed if Estero develops new housing that can accommodate some of the students attending FGCU, along with some of the young professionals associated with the Hertz Corporation headquarters.

ESTERO* POPULATION BY AGE GROUP
Year 2012 Estimates and 2017 Forecast

Age Groups	YEAR		Percentage Change 2012 to 2017
	2012	2017	
	% Total	% Total	
0-4	3.1%	2.8%	-4.4%
5-9	2.8%	2.6%	-1.7%
10-14	2.2%	2.1%	1.0%
15-19	2.3%	2.1%	-3.4%
20-24	4.7%	4.1%	-7.7%
25-34	6.9%	6.3%	-3.4%
35-44	6.5%	5.9%	-4.0%
45-54	8.7%	7.5%	-8.8%
55-64	20.4%	20.0%	3.7%
65-74	28.3%	32.1%	20.0%
75-84	11.9%	12.2%	8.5%
85+	2.2%	2.3%	10.6%
Total =	100.0%	100.0%	

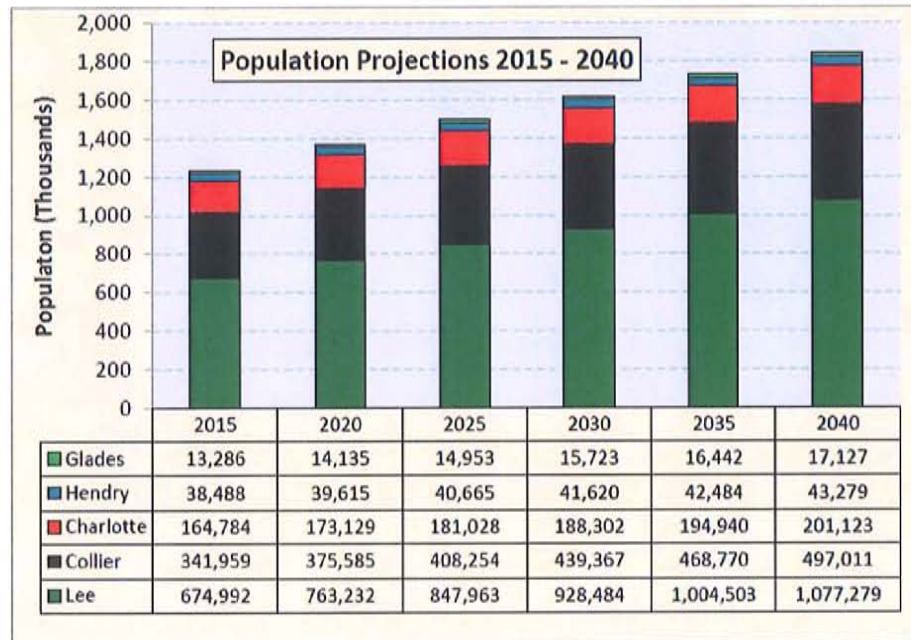
* Estero Census Designated Place Only. Does not include part-time population or greater Estero Planning Area.

Source: U.S. Census; InfoGroup; Claritas; and Peloton Research Partners

ESTERO HOUSING GROWTH & POPULATION FORECASTS

Lee County was the 3rd fastest growing county in Florida from October 2012 to September 2013, growing 10% over the 12-month period. This growth rate only slightly lagged the 11% growth in Collier County during the same time period. Broward County was the fastest growing county over the previous year, due in large part to continued international migration.

The Bureau of Economic and Business Research at the University of Florida in Gainesville projects that the estimated 2012 population of 330,000 in Collier County will grow about 51 percent, to 497,700, by 2040. Lee County’s 2012 population of about 630,000 is expected to expand nearly 68 percent to 1,070,200 during the same period.



Source: Florida EDR: Florida Demographic Estimating Conference, February 2013 and BEBR Florida Population Studies, March 2013.

Lee County is forecast to add 402,287 to its population during the 25-years from 2015 to 2040, for an annual increase of 16,091 people. The added population to Lee County would be in excess of the total population of Collier County in 2020.

Estero comprised 3.6% of Lee County’s population in 2010. Based on continued growth trends in Estero, the community should see an increasing share of the county’s

population total as it continues to outpace the growth of the county and the other communities in the county.

Based on a historical and recent review of development activity and population growth in the Estero community, PELOTON RESEARCH PARTNERS has come to the conclusion that recent Census figures did not accurately account for real population growth in the area. There are a number of reasons for the discrepancy, the most important being the limited household sampling that occurred with the 2010 Census. The Census Department has often struggled with small area population estimates and projections, but the 2010 Census brought changes that made it even harder for the agency to accurately count housing units and population growth.

The following is a review of the Census statistics for the Estero CDP from 1990 to 2010.

CENSUS YEAR	TOTAL POPULATION	HOUSING UNITS	POPULATION		HOUSING UNITS	
			Change 90-00	Change 00-10	Change 90-00	Change 00-10
1990	3,710	3,580				
2000	9,503	7,345	5,793		3,765	
2010	22,612	18,479		13,109		11,134

Source: U.S. Census; Peloton Research Partners

The figures to the right of the table show the net growth from 1990 to 2000 and 2000 to 2010 for population and housing units. As mentioned previously, Estero saw the largest growth rate in Lee County during these time periods.

As fast as these growth rates were, there appears to have been more growth than that indicated in the Census figures above. Population growth in the market has been highly correlated with housing unit growth in the area. Even though an estimated 30% of Estero’s housing units are purchased by part-time residents, the remaining 70% are purchased and occupied by year-round residents who would count in a physical door-to-door Census count.

The following table shows the residential construction permits issued since 2000 along with projected permits for 2013 and 2014 and forecasted estimates for permits for 2015 through 2020.

Estero Planning Area Permit and Population Estimates and Forecasts

Year	Housing Units Permitted	Occupancy Factor	Occupied Units	Average Household Size	Total Population	Population Percent Full-Time	Pop Number Full-Time	Population Percent Part-Time	Pop Number Part-Time
2000	2,008	95%	1,908	2.10	4,006	70%	2,804	30%	1,202
2001	2,104	95%	1,999	2.10	4,197	70%	2,938	30%	1,259
2002	1,500	95%	1,425	2.10	2,993	70%	2,095	30%	898
2003	1,425	95%	1,354	2.05	2,775	70%	1,943	30%	833
2004	1,646	95%	1,564	2.05	3,206	70%	2,244	30%	962
2005	2,833	95%	2,691	2.05	5,517	70%	3,862	30%	1,655
2006	1,310	95%	1,245	2.05	2,551	70%	1,786	30%	765
2007	432	95%	410	2.05	841	70%	589	30%	252
2008	167	95%	159	2.05	325	70%	228	30%	98
2009	164	95%	156	2.00	312	70%	218	30%	93
2010	194	95%	184	2.00	369	70%	258	30%	111
2011	181	95%	172	2.00	344	70%	241	30%	103
2012	341	95%	324	2.00	648	70%	454	30%	194
2013	421	95%	400	2.00	800	70%	560	30%	240
2014	392	95%	372	2.00	745	70%	521	30%	223
2015	431	95%	410	2.00	819	70%	573	30%	246
2016	474	95%	451	2.00	901	70%	631	30%	270
2017	522	95%	496	2.00	991	70%	694	30%	297
2018	574	95%	545	2.00	1,090	70%	763	30%	327
2019	631	95%	600	2.00	1,200	70%	840	30%	360
2020	694	95%	660	2.00	1,319	70%	924	30%	396

Source: Lee County Building Department.; Esteroff.org; Peloton Research Partners, 2013

The occupancy factor show the percentage of homes that would be considered occupied either year-round or part-time after purchase, either by the homeowner or a renter. The average household size is based on Census statistics. This is the average number of people in each residence. The total population column shows the number of people that occupy these units, both part-time and full-time. The full-time population column breaks-out only the portion of the total population that will reside in Estero more than 6 months per year. The part-time population is the other 30% that are considered to have the primary residence somewhere else. These figures give a better indication of actual population growth based on residential development.

Some of the key statistics derived from the previous population/permit table for the time period 2000 to 2010 are shown as follows:

Estero Population and Housing Growth 2000 to 2010		
Full-Time Pop Growth	Part-Time Pop Growth	TOTAL Pop Growth
18,706	8,017	26,723
Full-Time Housing Units	Part-Time Housing Units	TOTAL New Occupied Units*
9,037	3,873	12,910

* Note: this is the number of new units occupied by either part-time or full-time residents during the year.

Based on a correlation of permit activity with population in Estero, the community added 18,706 new full-time residents from 2000 to 2010. During this same time period the U.S. Census reported full-time population growth of 13,109. The permit figures indicate a difference of 5,597 residents versus the Census. The Census would have additionally under-counted the part-time population by a substantial amount. When looking at the total population change (part-time and full-time) in Estero from 2000 to 2010, the permit activity indicates a population change of 26,723 or 2,672 per year. When adding the 26,723 total population growth from 2000 to 2010 to the estimated Year 2000 full-time population figure of 13,578, the “in-season” population of Estero would be an estimated 40,301 in 2010. (See page 27 for a note on Estero population calculations.)

There are many implications of these higher population figures, including the appropriate level of planning for public services and resources. The influx of 30% of the total population during high season can place significant demand on public resources, such as public safety and medical services. The Estero community needs to be aware of the real impacts the larger population will place on the need for localized medical services in close proximity to the community. Based on the historical growth rate and larger the reported population figures of the community, Estero may have already outgrown the capacity of locally available medical services.

POPULATION & HOUSING FORECASTS TO 2020

The rows for the years 2013 and 2014 shown in the previous *Estero Planning Area Permit and Population Estimates and Forecasts* table are the estimates for new residential permit activity based on a survey of planned building activity of local builders for those years. Current estimates show 823 new units planned for 2013 and 2014. This equates to an additional 1,081 new year-round residents in the 2-year period. The figures for 2014 could be higher if local market conditions continue at their current pace.

The rows for the years 2015 through 2020 are forecasted permit activity by PELOTON RESEARCH PARTNERS based on a 10% annual increase of permit activity expected during the time period. This would result in an increase of 3,327 new residential units over the 6-year period and a full-time population increase of 4,425 or 737 new residents annually.

Based on the figures from the permit activity table, total part-time and year-round population in Estero is expected to grow by 8,858 for the time period 2011 through 2020. This would include the new growth that has occurred since the last Census. Given the previous 2010 estimate of Estero's in-season population of 40,301, the 2020 in-season population would be expected to reach 49,159 (40,301 + 8,858).

New housing demand in Estero would include demand from both year-round and seasonal residents. PELOTON RESEARCH PARTNERS has forecasted future demand of 3,327 new housing units in Estero from 2015 through 2020. Estero has been averaging approximately 3 units per acre for recent residential developments. This figure should be closer to 4 units per acre or higher, on average, for future developments. If 3,327 units were built at 4 units per acre, approximately 832 residential acres would be needed. The amount of land needed could be reduced through higher densities and the use of mixed-use lands to incorporate residential units.

The historical average annual permit activity in Estero for the time period 2000 through 2010 was 1,253 permits per year. Though it is unlikely Estero will see the large spikes in activity experienced in 2000, 2001, and 2005, the community has many attributes that will make it a draw for more development and more residents. Estero is maturing as a community, and the years of thoughtful planning and infrastructure improvements have enhanced the community's character and appeal. As long as affordable to moderately

priced residential land is available for future development, the community should see continued growth in annual permit activity. The new Hertz headquarters should bring an influx of new employees and residents to Estero, aiding the initial spike in permit activity starting in 2015.

The following are important clarifications regarding the population and permit figures. The Census estimated Estero as a Census Designated Place based on boundaries that did not include the larger Estero Planning Area. Communities that have developed in the Planning Area that were not included in the Census include: The Vines, Osprey Cove, Belle Lago, and The Reserve at Estero. These communities will contain approximately 1,700 units when they are completed. During the 2000 to 2014 time period shown in the previous *Estero Planning Area Permit and Population Estimates and Forecasts* table, these projects contributed approximately 1,250 units to the permit totals shown in the table. Based on a 95% vacancy factor and an average household size of 2.0, these four communities made up approximately 1,662 new year-round residents in the totals shown up to 2012. If an apples-to-apples comparison of the 2000 to 2010 Census figures was made with that of the population growth figures based on permits for the same time period, the 1,662 new year-round residents would need to be removed from the calculation due to differences in the Census boundaries of Estero versus that of the Planning Area. Even with the removal of the population attributed to these communities, the Estero CDP population far outgrew the population figures indicated by the Census during the periods examined.

LEE COUNTY & ESTERO EMPLOYMENT & JOB GROWTH

Lee County has continued to see job growth during 2013 and is outgrowing the overall recovery being seen for the State of Florida and the U.S. overall. Over the last two years, Florida's private-sector has created over 294,000 new jobs, for an average of 12,250 new jobs every month. Lee County unemployment declined from a rate of 9.7% in July 2012 to 7.6% in July 2013. Collier County declined from 9.8% to 7.5% over the same time period.

Collier, Lee, and Palm Counties led the way in job growth for the State over the past two years. Collier County's 2012 growth rate was 3.4% while both Lee and Palm County's annual job growth rate was 2.5%. The strongest sectors of positive job growth for Lee

County were in the following industries: leisure and hospitality (+3.9%); trade transportation and utilities (+3.7%); information (+3.4%); and construction (+3.1%). Meanwhile, Collier County's positive growth rate was primarily driven by the following industries: professional and business services (+12.4%); construction (+4.4%); leisure and hospitality (+4.4%); and manufacturing (+4.0%).

Given the continued recovery being experienced in the Southwest Florida residential real estate markets, construction employment is expected to see significant increases in both Lee and Collier Counties over the next year. Collier County's growth in the professional and business services and manufacturing sectors demonstrates strength in sectors with higher average wages than those typically seen in the leisure and hospitality sectors. Lee County's recent job growth is a positive indicator, though the County should focus on growth in sectors with higher wage and salary prospects. Growth in the County's information industry provides insight into a sector with increasing prospects for future growth. This sector, along with science, biotechnology, healthcare, education, and research and development, are sectors the County is targeting in an effort to attract higher-wage, clean-industry jobs.

Growing a Lee County Workforce That Will Fit the Needs of Local Companies

The following are excerpts from an assessment and findings provided by PELOTON RESEARCH PARTNERS in March 2013 in regards to Lee County employment prospects and the ULI Report on the Research & Enterprise Diamond.

Lee County can continue to grow in strong industries that are not as competitive for land consumption as the mining industry, and that can also provide jobs to the local population. The County and the community of Estero have ample commercial and industrial lands to support future clean-industry growth. If only half of the 1,100-acre Research & Enterprise Diamond were developed at a minimum of 20 employees per acre, the area could support a minimum of 11,000 new jobs.

A lack of local qualification for local jobs

The Lee County Business Climate Survey Report from the first quarter of 2013 reveals current weaknesses in the local job market as well as an opportunity for businesses to partner with educational institutions to create programs that will produce the kind of workforce needed.

Most business executives surveyed are optimistic about their companies' growth, which suggests that an investment in training workers to fill the needs of those companies would be worthwhile for the future employment of Lee County residents. Furthermore, programs should be molded for both younger and older members of the population, as both of these age groups will continue to grow and play a substantial role in the economic future of Lee County.

Needed skills

The following points are from the business climate survey that suggests the kind of workforce development needed.

Executives need employees with the following skills: analytical, critical thinking, computer and programming, customer service, interpersonal/communication, leadership, listening, machine operator skills, multi-tasking, networking, problem solving, reading comprehension, time management, sales, web design, and writing.

Critical positions and occupations the executives indicated to have trouble filling included account representatives, CNC robotic technicians and programmers, customer service, electricians, IT professionals (including computer support, programming, application software, networks, and web design), sales, marketing, and skilled trades.

Investment in a university business cluster, the Research and Enterprise Diamond

The Technical Assistance Panel (TAP) from the Urban Land Institute together with local expertise assessed a 40-square mile area in Southern Lee County, called the "Research and Enterprise Diamond" to advise the county on market potential; planning and design; and implementation strategies. The overall vision is a cluster or hub of high tech/clean/green/sustainable economic development, where universities and businesses can develop new ventures from the co-location of mutual resources and shared knowledge. A take-away from the TAP report where Lee County can take immediate action is the "keys to sustainable development," which include the availability of improved land, predictability of cost and time for development, and a qualified workforce. The Lee County government with its Fort Myers Regional Partnership and Horizon Council can provide guidance and model legislation and programming to help with the need for improved land and the predictability of cost and time for development.

Appropriately gathering data on available space and marketing that space for new businesses or business expansion is a habit practiced elsewhere in the country to encourage businesses to fill vacant spaces. Incentives can also be provided to help businesses transition into existing, vacant spaces similar to existing programs that help expedite that process.

D. REAL ESTATE MARKETS, LOCAL DEVELOPMENT, & LAND USE

This section provides an overview of real estate markets in Estero with an emphasis on residential, office, commercial, and retail market sectors. The current market conditions and recent activity levels are assessed for various property types. Vacant parcels and the prospects for a central Estero town center are reviewed and analyzed.

ESTERO OFFICE & RETAIL DEVELOPMENT ACTIVITY

The Estero market for commercial space has been improving over the previous three consecutive quarters according to the regional office of Cushman & Wakefield real estate brokerage. This is good news for a market that has experienced an accumulation of vacant commercial buildings and commercially-zoned land over the past five years. The office market has been the hardest hit with vacant space exceeding 20% in 2013.

From 2000 through 2008, Estero experienced over \$750 million in commercial development activity. The community added many new retail and office assets including: the Miromar Outlets, the Hyatt Coconut Point Resort, and the Coconut Point Mall, along with many smaller neighborhood retail centers and office developments. There is approximately 4.7 million square feet of retail and office space in Estero at this time, with approximately 3.5 million square feet represented by retail space alone. New commercial development activity has been very limited over the past five years due to the considerable inventory of vacant space currently on the market.

In a recent media report, Gary Tasman, founder and executive director of Cushman & Wakefield Commercial Property Southwest Florida, said commercial real estate will continue to improve. He doesn't think there will be new office construction, but there will be a decrease in vacancies with rents stabilizing and possibly increasing. However, there may be some new construction in retail spaces and Southwest Florida may see a few new grocery stores. Yet, Tasman said there will definitely be speculative construction of industrial spaces along the I-75 corridor. There is hardly any inventory in

that category, and he said a hint of demand is percolating. “I think the real booming commercial real estate is going to happen in 2014, 2015,” he said.

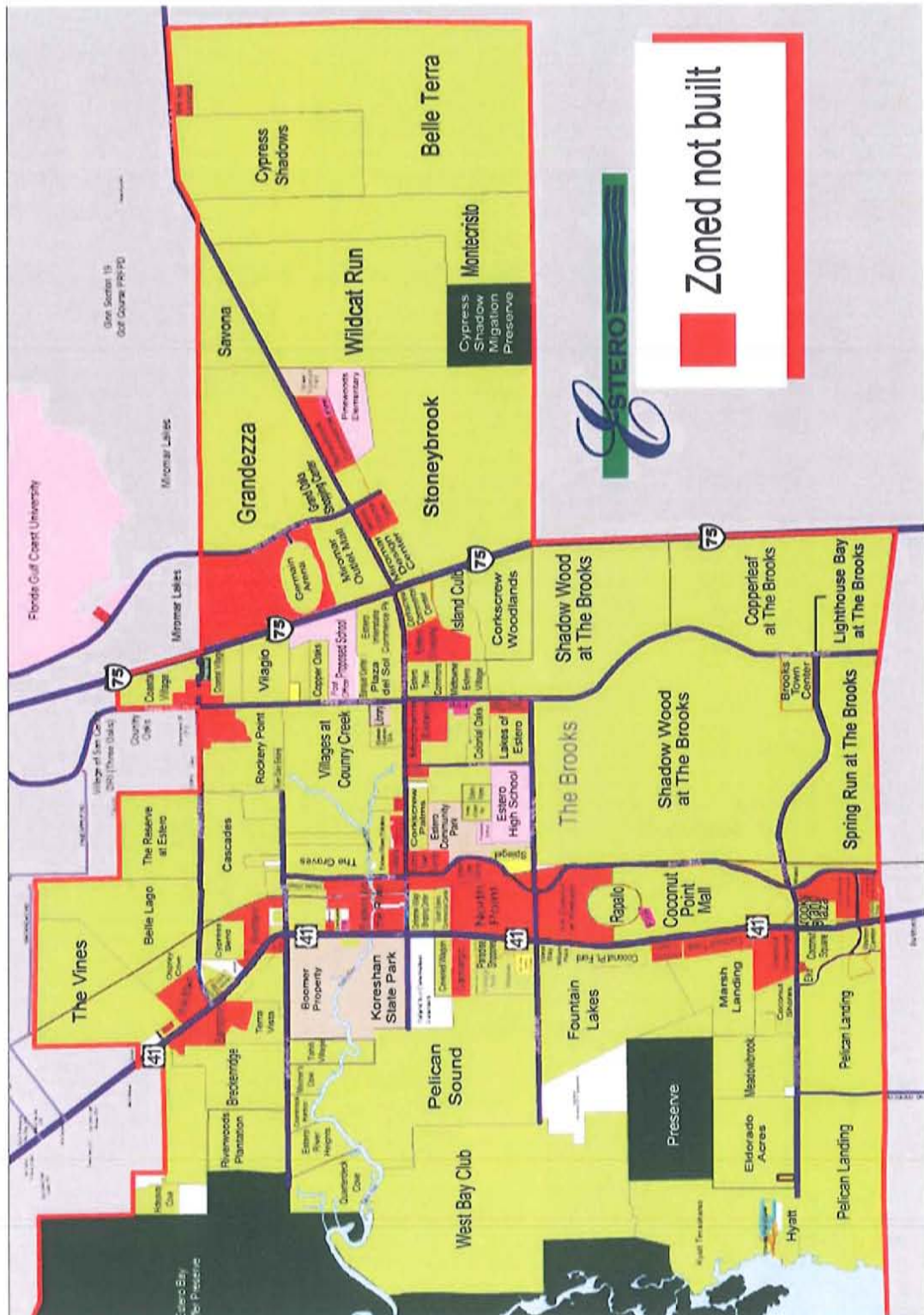
As noted, Estero currently has no shortage of available office space. PELOTON RESEARCH PARTNERS conducted a survey of listed properties being offered for-sale or for-lease in the market (a list and summary of these properties is available in the Appendix of this report). Based on a small sampling of office properties located along Corkscrew Road and US-41 there was approximately 50,000 square feet found to be vacant, not including office space proposed to be built on vacant land.

Estero does not typically experience a high-rate of absorption of office space on an annual basis. Based on the sampling of properties along US-41 and Corkscrew Road, and the extended list provided in the Appendix of this report, there appears to be anywhere from 2 to 3 years of existing office inventory in place (depending on annual absorption rates). What was also noticed was the type of space being offered for-sale and for-lease versus what potential owners or tenants may need in the market. Potential tenants may require different space configurations than that currently being offered by existing buildings. The general demand trend is for smaller office spaces or larger spaces that can be easily configured into smaller, more flexible spaces. Building owners and office space developers need to evaluate potential smaller space needs and the divisibility of existing spaces.

Estero has a number of office spaces and condominiums for sale that are listed as retail/service spaces. These spaces are often targeting medical services, insurance, financial services, retail showrooms, and personal service operators. A survey of these spaces showed a wide-range of asking prices ranging from \$75 to \$175 per square foot for units built primarily since 2005. Many of the properties listed for-sale listed at prices that would not appear to cover the costs of their development (especially when factoring in land value). This is a serious concern when looking at the potential for new retail and office development opportunities in the Estero market. A high vacancy factor combined with properties listed at less than their replacement value would indicate the some sectors of the commercial market are not in equilibrium.

Company relocations, expansions, and new business start-ups will be the drivers of office space demand in Estero over the next decade. The community should seek to accelerate business attraction and economic gardening prior to creating any additional speculative office inventory.

The following map shows the currently zoned, but vacant properties within the Estero community. The areas highlighted in red represent the vacant parcels.



DOWNTOWN ESTERO DEVELOPMENT OPPORTUNITIES

The map on the previous page identifies the properties that are currently zoned but not built (highlighted in red). The following is an overview of a number of currently listed properties in Estero that have the potential for inclusion in a comprehensive Downtown Estero development plan. These properties are located along the Hwy. 41 corridor west of I-75 and could potentially be interconnected in a multi-district master development plan. Some of the listing details, including the project and/or property name and the developer and/or broker name, are noted as follows:

1) Coconut Trace (Dennis J. Lynch PA)

Coconut Trace is a 24-acre development located on the west side of US-41 between Williams and Coconut Roads and fronting the 500+-acre Coconut Point mixed-use development. There are two lots currently listed for-sale, a 1.92 acre lot listed for \$1.82 million, or \$22 per square foot, and a 1.62 acre lot listed for \$1.55 million, or \$22 per square foot (or \$956,790 per acre).

The project is proposed for a combination of uses, including retail, office, and medical. Current uses on formerly sold lots include SunTrust Bank. Development entitlements allow for 90,000 square feet of retail and office space and another 135,000 square feet of office and medical space. The site is within a Commercial Planned District and fronts conservation lots. A current proposal with four buildings totaling 15,601 square feet, including a 3,401 square foot Pollo Tropical Restaurant, is being brought before the Estero Design Review Committee on September 25th.

A 3.37 acre parcel across the street fronting the Coconut Point Mall is currently listed at \$3,669,930 or \$25 per square foot (or \$1,089,000 per acre).

2) Downtown Estero Development (Rockford Development Group, Lee & Associates)

Downtown Estero Development is a 35-acre mixed-use development located on the east side of South Tamiami Trail and north of Broadway, at the north end of the historic area of Estero. The project is proposed for a combination of uses, including retail, restaurants, and office, along with a residential component (4 stories, 310 units) and a senior housing component (90 – 160 beds).

Amenities of the project include the following:

- parkway ramp
- clubhouse
- pool
- lake features amenities with walkway paths
- natural preservation area
- pedestrian civic areas

3) Estero Greens (Fischler Property Co)

Estero Greens is a 10.16-acre property located along South Tamiami Trail, on the west side of US-41 and south of Williams Road. It is approximately a ½ mile north of Coconut Point Mall and opposite Hertz 300,000 SF World HQ (located on the former Art District of Rapallo site). The price for the entire property is listed at \$5.5 million, or \$12.42 per square foot. The price for outparcel lots is listed at \$21.50 - \$23.50 per square foot.

The project is proposed for a combination of uses, including hotel, retail, restaurants, financial, and auto. Utilities currently available at the property boundary include County water, gravity sewer, telephone, and electricity. The site is zoned as a Commercial Planned Development. The following is a former conceptual mixed-use site plan.



4) Estero on the River (Kevin Fitzgerald, CSE of NAI Southwest Florida, Inc.)

Estero on the River is an 88-acre property located at the intersection of US-41 and Corkscrew Rd. Development entitlements allow for 530 residential units (single and multi-family) and +/- 300,000 square feet of commercial uses, with density bonuses available. The following is a conceptual site plan used in the marketing of the development site.



Note: According to the development plan, the commercial space is allocated as follows: 177,000 square feet of retail space, restaurants, and a boutique hotel; 87,000 square feet of general and medical office space; and 36,000 square feet for civic use. It also notes that landings and decks will provide public access to the riverbanks, and a 75-foot greenway spine connects all residential areas to the river buffer. Note: the property is listed with an asking price of \$30 million or \$340,909 per acre.

5) Northpoint (Lutgert Companies)

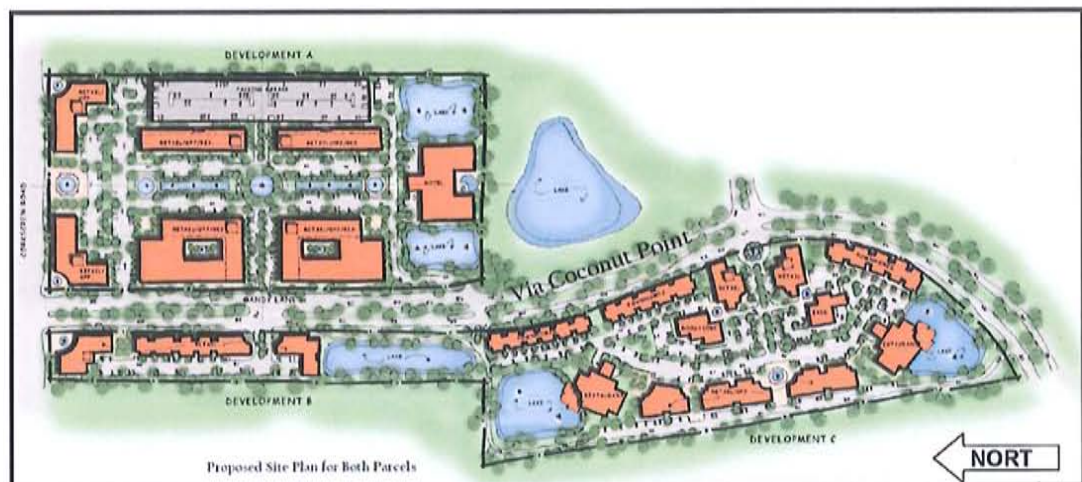
Northpoint is a 102-acre property located on the east side of US-41 just north of Williams Road and is zoned for 550,000 square feet of commercial retail space, 120,000 square feet of office space, a 150-unit hotel and 150 residential units. Lutgert purchased this property in February of 2006 for \$34.4 million. The plans were to build-out a mixed-use development in a joint venture. The developer has sought a reduction in commercial

square footage to make room for more residential units. Just to the north is Corkscrew Village which has a Publix anchor and other stores. The property would be well-suited for residential in a mixed-use environment. Given the size of this site, it is one of the more important properties to consider when reviewing the prospects for a multi-district Estero Downtown development.

6) Estero Town Center (Via Coconut Point)

Property is located ¼ mile east of US-41 on the south side of Corkscrew Road, 1.25 miles from I-75 Exit 123. The property includes two (2) parcels. The parcel on the westside of Via Coconut Point comprises 17.6 acres with approximately 100 linear feet of frontage on Corkscrew Road and approximately 3,000 linear feet of frontage on Via Coconut Point. The parcel on the eastside of Via Coconut Point comprises 16.92 acres with approximately 600 linear feet of frontage on Corkscrew Rd. and approximately 1,250 linear feet of frontage on Via Coconut Point.

The combined 34.52 acre site includes a mixed-use overlay. An illustrative site plan is shown below.



The site is located adjacent the 75-acre Estero community park and is north of the Coconut Point Mall. The current asking price is \$14,660,989 for all 34.52 acres, or \$424,710 per acre (\$9.75 per square foot).

7) Galleria at Corkscrew East & West

The Galleria at Corkscrew comprises two parcels of 9.9 acres and 11.4 acres located on the north side of Corkscrew Road just east of Sandy Lane. The following is a conceptual plan and description provided from the property listing:



Design Parc & Galleria at Corkscrew Conceptual Site Plan

The project features a prime location in an established market with excellent demographics. The entitlements and improvements are in place positioning the property to competitively meet the needs of developers looking to immediately enter the market. The Galleria at Corkscrew is located in the center of Estero in close proximity to I-75, the Southwest Florida Regional Airport, Germain Arena, public schools, libraries, medical centers and close to great shopping at the Coconut Point Mall, Gulfcoast Town Center and Miromar Outlets. There are roughly 15 golf courses within a 3-mile radius.

- On-site improvements include a buffer wall acting as a barrier to the residential community to the North.
- 50% of the capacity infrastructure reservations have been paid.
- Impact fees run with the land and are considered to be a site improvement.
- Off-site improvements pertaining to Corkscrew Rd include paving, concrete curb, gutters, storm sewers, sidewalks, lighting and utility lines (water, sewer, elec, tele).
- 9.94± acres on Corkscrew Rd., one mile from Coconut Point Mall
- Convenient access to US-41 and I-75
- Zoned for 30,000 SF retail/restaurant space and 70,000 SF medical/office space

- DO with architectural plans for 4 one-story buildings and 2 two-story buildings includes adjacent parcel

The combined parcels were recently listed for \$6.2 million or \$291,079 per acre. The 9.94-acre parcel is listed by itself for \$3.2 million or \$321,931 per acre.

8) Coconut Crossing

This property is located at the northwest corner of US-41 and Coconut Road across from Coconut Point Mall. The following is a former conceptual site plan.



The original project was to be located on approximately 46 acres and was to be developed by The D'Jamoos Group as mixed-use commercial. Another company was due to develop the residential component on an adjacent 14.4-acre parcel. Also planned on the site was a 150-room Marriott SpringHill Suites Hotel (LEED Certified). The major retail planned for the project included an 87,000 square foot Kohl's department store and approximately 14,000 square feet of inline retail. In a press release back in 2008 the developer explained that Kohl's was chosen due to its popularity in the Midwest and Northeast, and its demographic fit with this area. In addition to these developments, the site included eight out-parcels. In 2008, only four of the parcels were reportedly available for sale or lease. The purchased lots were reportedly bought by Orion Bank, Florida Community Bank and CVS Pharmacy (which had two lots). The site was cleared and infrastructure put in place (including Lyden Road).

The original developer of Coconut Crossing purchased the 46-acre site for \$18.5 million in August of 2005, or \$402,173 per acre. That same month, the 14.4-acre residential parcel appears to have immediately sold for \$9.23 million, or \$640,972 per acre. In 2012, a 1.2 acre parcel of the commercial site was sold by the FDIC for \$250,000 or \$4.78 per square foot. This parcel originally sold in 2007 for \$1.65 million. Another 1.05 acre parcel was

sold to Iberia Bank in September 2010 for \$700,000 after originally being sold for \$1,097,000 in 2007. During April 2013, 27.85 acres of Coconut Crossing were sold at auction for \$3 million, or \$107,720 per acre. No new development plans have been submitted for this project as of September 2013.

Additional smaller properties would include the approximately 10-acre Halfway Creek site located long US-41 north of Marsh Landing and the 11-acre Camargo North parcel located on US-41 north of Pelican Sound Boulevard and south of Covered Wagon. A portion of the Halfway Creek site was planned at one time for a commercial office building, but no updates are available. Neither property was identified as being for-sale at this time.

Potential University District Properties

There are two additional properties of interest near I-75 that may contribute to the establishment of a University District near the Florida Gulf Coast University. Both the University Center and University Highlands development sites have previous development plans attached to them, and portions of both projects are currently listed for-sale. Though these properties would not be attached directly to a potential Downtown Estero development, a community plan that connects the Downtown to a University District would be advantageous to the community overall and would help support the economic vitality of the community. The following is a summary of both the University Center and University Highlands development sites.

University Center

University Center (formerly known as Tuscany Park) is a 36-acre commercial-planned development located at the northwest corner of Three Oaks Parkway and Estero Parkway; it is less than 2 miles east of US-41 and approximately ¼ mile west of I-75. The project includes an anchor-tenant parcel (13.6 acres) and eight out-parcels ranging in size from 1.3 acres to 2.6 acres. The project is fully entitled with 90% complete onsite backbone improvements, including roads, accesses/turn lanes, surface water management, and utilities. The project is zoned as a Commercial Planned Development and approved for a maximum of 250,000 square feet of retail commercial use and 50,000 square feet of office use.

Note: Due to the proximity to Florida Gulf Coast University, the Seller suggests this would be an excellent site for an apartment/student housing development. The Seller is willing to allow time to modify the zoning (if needed) to maximize the residential and/or commercial component of the project. As of July 2013, 18-acres of this site have been sold to accommodate a new apartment development.

University Highlands

University Highlands is a 208-acre project situated between Interstate 75 and Ben Hill Griffin Parkway. It is the remaining portion of the 795-acre multi-use Development of Regional Impact known as Timberland and Tiburon. The project is approved for a maximum of 1,300 dwelling units, 150,000 square feet of office (including a maximum of 50,000 square feet of medical, 99,382 square feet of retail, and 200 hotel units). The dwelling units can include uses such as Assisted Living and Continuing Care facility units (with up to 200 units with cooking facilities or 800 units without), 555 single-family units, 800 duplex units, 800 two-family units, 1,300 townhouse units, or 555 zero lot line units. Dormitory and fraternity uses are also permissible on this site, with an intensity of 1,300 units with cooking facilities and a maximum of 5,200 units without cooking facilities. (Note: A combination of the approved residential types will be allowed based on the following conversion rates: 2.3 multi-family/townhouse units per single family unit; 1.6 multi-family/townhouse units per duplex/two-family unit.) Note: this property is listed with an asking price at \$47.5 million or \$228,365 per acre.

The diversity in listing prices and sales prices for the larger mixed-use development land in the Estero market reveals some of the uncertainty property owners and developers are experiencing when trying to determine the prospects for future commercial development. The properties previously listed are only a portion of a substantial number of potential development sites within the community. Given the depth of retail options already present in Estero, and the coming addition of a 185,000 square foot Super Wal-Mart store to the community, the properties previously highlighted will be hard-pressed to bring individual retail operators to the market that will occupy a significant portion of the 340+ acres of potential mixed-use development.

Estero already has an abundance of smaller, stand-alone retail centers as part of its 4.7 million in commercial/retail space. Total retail space is estimated to be 3.5 million square feet in 2013, including the Coconut Point Mall and Miromar Outlets. Additional population and job growth will be needed to attract additional retailers to any newly

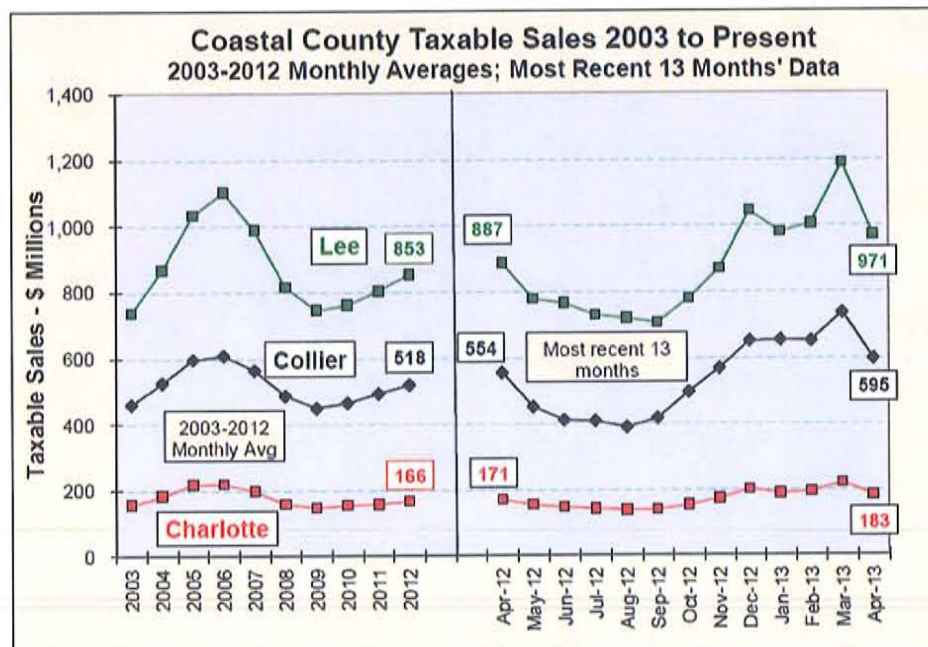
developed space. Another option is to draw more consumers from outside the immediate community, as Coconut Point Mall and Miromar Outlets have both done successfully. The establishment of a true Town Center in Estero, complete with multiple districts, would create the appropriate destination necessary to support more retail development along with other key commercial uses.

RETAIL MARKET OVERVIEW

This section provides an overview of retail activity within Lee County and the Estero community. Retail spending per household in Estero is examined in an effort to evaluate the prospects for future retail demand and retail development.

Lee County

Lee County has experienced a return in retail sales activity following declines that started in 2006 and continued until the 3rd Quarter of 2009. Sales in this market tend to be seasonal, and the county experienced some temporary declines following December of 2012 and then again following March of 2013. Nevertheless, the county saw average monthly taxable sales increase from \$887 million on average in April 2012 to \$971 million per month average in April 2013. The county is expected to see increasing sales activity over the next four quarters as consumer confidence continues to improve.



Source: Florida Department of Revenue, Office of Tax Research

Estero Retail Market Context

The Estero retail market lies within a relatively low-density, modestly upscale community situated between two more densely populated areas -- Naples and Bonita Springs to the South and Ft. Myers/Cape Coral area to the north. All of these communities lie along a north-south axis defined by the two primary arterial corridors of I-75 toward the eastern edge of the currently developed area, and US-41 (Tamiami Trail), which tends to form the primary central spine of the region. The larger metropolitan area is constrained from further development to the west by Estero Bay and the Gulf of Mexico, while development to the east is discouraged by protected natural areas, competing agricultural and mineral-excitation industries, as well as growth management initiatives intended to limit development in these areas.

The existing retail in Estero and nearby communities primarily consists of a combination of grocery anchored, locally serving shopping centers, even located at about two mile intervals throughout the area, and more regionally focused centers in a range of formats including life-style centers, outlet centers, power centers, traditional malls, or a combination of all of the above, in addition to large-format club and warehouse stores. The regional consumer market as a whole is quite robust, with a largely affluent year-round population of close to 300,000 people within a 20-minute drive of Estero, making Estero's strategic location between Naples and Fort Myers, with good access from both I-75 and US-41, an attractive location for large regional centers drawing from the entire metropolitan market.

Most of the newest and most ambitious shopping centers in the area, including Coconut Point Mall in Estero and the Mercato in Naples, were developed during a period of unprecedented residential and income growth, which took place in the middle of the last decade, and reflect the optimistic assumptions of an ever growing consumer market prevailing at the time. A little worse for the wear -- for the most part -- they managed to weather the recent downturn relatively intact, in spite of the stagnation in both the housing and consumer markets, post-bubble, and with currently low vacancy rates, seem well poised to benefit from the ongoing market recovery.

However, the amount of retail GLA (gross leasable area) represented by all of these projects, including that contained in the grocery-anchored neighborhood centers, were pushing the margins of saturation even before the market collapse. Absent a major increase in consumer demand, either in the form of new housing and/or new jobs, it is

unlikely the market can sustain significant increases in the current amount of retail supply, without diluting or cannibalizing sales from existing centers, and opportunities for obvious market niches will be very limited. This reality contrasts sharply with the amount of retail square footage entitled at the peak of the market, and yet to be developed, which is still waiting for a recovery which might look quite different from the inflated market that subsided in late 2006.

The large visitor market, proximity to I-75, and convenient access to area tourist destinations made outlet retail an obvious and attractive opportunity, which the Miromar Outlets has effectively captured. The large, affluent, regional consumer market, blessed with significant disposable income, is also tempered somewhat by the seasonality of that market, and the year-round local population is of more modest means, limiting the opportunities to grow the market for more upscale, regional centers. The supply-driven momentum which produced the surge in retail GLA during the pre-bust era will more than suffice to service the existing market well into the future. Developing housing markets elsewhere in the region, such as the Ave Marie master-planned development in Naples, will work even harder to capture and protect what new household consumer spending emerges as the market recovers, thereby limiting opportunities for the kind of preemptive retail market grabs that were typical of the area, pre-2007.

Given that, everything from this point forward is going to require more strategic planning and development to maintain equilibrium, it will be necessary to balance new retail growth with consumer demand in a new type of format, build on the enviable reputation Estero proudly enjoys, which consciously targets household and employment growth through a more fully integrated approach to new development which anticipates new market and demographic trends, and allows for a more sustainable model of development.

Estero Current Retail Supply and Sales

As previously noted the rapid population growth of the community brought rapid growth in both residential and retail development over the past decade. Residential development absorbed considerably more land than that of retail or commercial uses over the decade, though retail development far outpaced the capacity of the local

population to support the end uses. This was due, in large part, to the establishment of Estero as a regional retail destination.

Coconut Point Mall and Miromar Outlets were the two largest retail centers built in Estero over the decade, and both of these retail centers targeted households well beyond the Estero community boundaries. The following is a site plan for the 166-acre, \$225 million Coconut Point Mall.



This Coconut Point has 140 retail tenants in 1.2 million square feet of retail space while Miromar Outlets has 130 retailers occupying approximately 700,000 square feet of retail space.

Overall, retail and commercial development added 4.7 million square feet of new space in Estero over the past decade. More than half of this space is comprised of neighborhood retail centers, small strip centers, and the two larger regional retail centers. There is an estimated 3.5 million square feet of retail alone in Estero in 2013. This is a considerable amount of retail square footage for a community of less than 12,000 year-round households during 2012 (using Census figures as a basis), revealing, in large part, the financial influence of part-time residents and visiting consumers.

Retail sales activity in Estero during 2012 was estimated by PELOTON RESEARCH as just under \$810 million. The following major retail categories are included in this figure: automobile sales and parts; furniture and home furnishings; building materials; lawn and

garden supplies; electronics; health and personal care; clothing and accessories; gas stations; shoes; jewelry; luggage; books, music, and periodicals; sporting goods; general merchandise; florists; grocery, beer, and wine; restaurants and bars; among other categories.

Using an approximate figure of 12,000 year-round households in Estero as a basis, the retail \$810 million in retail sales in 2012 equated to \$67,500 per year-round household (\$810 million/12,000 = \$67,500). Given that the entire disposable income per household in Estero was \$51,645 in 2012, and approximately 32% of this was spent on average on local retail, the actual contribution of local year-round residents to total retail sales was approximately \$15,493 per household for the year. The calculation for the average annual retail contribution of year-round households is shown as follows:

$$\$51,645 \times 0.32 = \mathbf{\$16,526 \text{ per year-round household annually}}$$

If we assume that the approximate 6,000 part-time Estero households in 2012 had an average median disposable income that was 20% above year-round household median disposable income, but these households only spent 16% of this disposable income locally (due to half-time residency), the following calculation would show their annual retail spending per household:

$$(\$51,645 \times 1.20) \times 0.16 = \mathbf{\$9,915 \text{ per part-time household annually}}$$

Adding the impacts of the year-round household retail spending with that of the part-time household spending reveals the dollar impacts of the local “in-season” household spending on total retail sales in Estero during the 2012. The calculation is shown as follows:

$$\begin{aligned} (12,000 \text{ HH} \times \$16,526) + (6,000 \text{ HH} \times \$9,915) &= \\ \$198,312,000 + \$59,490,000 &= \\ \mathbf{\$257,802,000} & \\ \mathbf{\underline{\text{Total retail spending by local residents}}} & \end{aligned}$$

Given the previous figure of \$810 million in retail sales in Estero in 2012 the following can be concluded:

$$\$810,000,000 - \$257,802,000 =$$

\$552,198,000

Total retail spending from other households

The calculations reveal that the overwhelming majority of retail spending in Estero is coming from households other than those estimated as part-time and year-round residents within the community. Over \$550 million, or 68%, of retail spending is coming from households in surrounding communities within Lee and Collier Counties, from tourists visiting Estero, and any households within Estero that are not counted as part of the year-round or part-time population. These numbers are important to consider when analyzing the potential for new retail operations in Estero. Though the future growth of the Estero population is important to the future demand for retail in the community, the growth and demand from the surrounding market areas and from visitors and tourists to Estero is even more important.

Just two retail centers, the Coconut Point Mall and Miromar Outlets, contribute the highest overall percentage of retail sales to the Estero economy. The total retail sales revenue at these two centers was a combined \$612 million in 2012. This is average revenue of approximately \$322 per square foot over the combined 1.9 million square feet of these two centers (adjusted for vacancies). This is well above the average retail sales rate of \$136 per square foot reported by CoStar Group for Southwest Florida retailers in 2012. More importantly, this leaves approximately \$198 million in retail sales deriving from the remaining retailers located in Estero during 2012.

The trade area required for retail centers such as Coconut Point Mall and Miromar Outlets typically ranges a minimum of 75,000 to 100,000 households within a 20-minute drive. In 2012, Coconut Point Mall had just over 129,000 year-round households within a 20-minute drive. When combined with the part-time household population, there is substantial market support identified for both retail centers. The Mercato in Naples has overlapping, upper-income, target households that it competes with Coconut Point to attract. Gulf Coast Town Center, located directly north of Estero in Fort Myers, competes directly with Coconut Point for both upper-income and moderate-income households.

There is considerable overlap between the markets of these two centers, especially in the sectors that include bigger-box power-center retailers. CBL Group, the owners of Gulf Coast Town Center, have reported that this center averages retail sales of \$310 per square foot, or in excess of \$360 million total annual sales. The following information provided by CBL describes the Gulf Coast Town Center and its trade areas (trade areas that also overlap with the trade areas of both Coconut Point and Miromar Outlets):

Gulf Coast Town Center is located in Ft. Myers, in the high-growth corridor along busy I-75 between Ft. Myers and Naples.

Lee County is in the heart of one of Florida's most popular and affluent tourist areas hosting more than 6.5 million visitors each year. Local draws include the beautiful beaches, a vibrant downtown and numerous champion golf courses. Only six miles from Gulf Coast Town Center, the new Boston Red Sox spring training facility hosts training games in a 9,999-seat Fenway replica ballpark.

Gulf Coast Town Center is poised to capture the upscale growth occurring within the primary trade area. Housing has been trending upwards each year for the past five years. The majority of growth has occurred in the exclusive subdivisions such as Miromar Lakes, Grandezza, Bella Terra and Pelican Landing with prices ranging from \$300,000 to more than \$4 million.

There are more than 24,000 students attending six colleges and universities within the trade area, including the new Florida Gulf Coast University adjacent to Gulf Coast Town Center with an enrollment exceeding 13,000 students and projected to be 15,000 in the next five years.

As communities surrounding Estero continue to add retail centers in their markets within close proximity to Estero's existing trade area, the more impact this will have on the sales potential for existing and future retailers within Estero.

Estero Future Retail Demand

Existing retailers in Estero, and any new retailers considering locating in Estero over the next decade, will require significant new population and job growth within the community as well as new growth in the surrounding trade area. Estero is currently over-zoned for retail uses relative to future demand, and steps need to be taken to avoid retail duplication and saturation that harms successful local retailers, or worse, sets them up for failure. Vacant retail space in a location that would typically be considered prime

based on traffic counts, number of households, and household incomes, sends a clear signal to potential retailers that a market may be saturated.

There is an estimated 3 million square feet of additional future retail zoned on Estero lands. Over the past two decades approximately 3.5 million square feet of retail has been built, at a pace that could not be replicated in the future. Assuming 3 million square feet of retail space were to be built at a land-to-building ratio of 4-to-1 would suggest the need for 12 million square feet of land to support the built space, or approximately 275 acres to support 3 million square feet of retail uses.

Based on the review of existing retail sales in Estero, it was discovered that 68% of retail sales comes from outside the community. This is due in larger part to the influence of larger regional retailers in Estero that rely heavily on larger trade areas. Future retailers may be less interested in competing in the larger regional market, and may attempt to fill certain niches not currently present in the Estero, in an attempt to capture market segments that area currently underserved.

If future retailers require an average of \$200 per square foot in annual sales, and 1 million square feet of new retail is built in Estero, then \$200 million in annual retail sales would be needed to support this space. If a minimum of 32% of those sales come from within Estero, then \$64 million in spending will need to come from Estero residents, both part-time and year-round. To put this in perspective, each household in Estero contributes enough annual spending to support approximately 80 square feet of retail space (across all retail types). One million new square feet would require new household growth of 12,500 in Estero to be supported, or population growth of approximately 25,000 in households that average two people per residence. Estero is not projected to grow at this level over the next 20 years, so more retail demand would need to come from the surrounding market areas to support 1 million new square feet of retail space.

Given the 3 million square feet of retail currently planned for Estero, it becomes apparent the community is in danger of serious retail saturation. To combat this, the planners and developers within the community need to be very careful in the selection of future retail operators and the execution of future retail developments. In such a competitive market as that of Lee County, the quality and mix of retail will become more important with each new addition of space. Destination retail and dining will be the

largest opportunities moving forward, and based on a survey of Estero parcels with retail development potential, the community has more than enough land to fill this need in a cohesive fashion that connects with other complimentary uses that further feeds retail demand. This would additionally support the community's desire to create a multi-district centralized core that functions as Downtown Estero.

MULTI-DISTRICT DOWNTOWN PLAN

Enough vacant land, over 340 acres, is potentially available to develop a multi-district town center in Estero. These districts could include, a mixed-use business district focused on corporate offices (with Hertz new headquarters as the catalyst), a medical/wellness district incorporating an acute hospital facility and ancillary medical services, including an adjacent senior care facility, and an entertainment and recreation district, including connectivity between the Estero Community Recreation Center and Koreshan State Park.

The plan for a multi-district town center would most likely require the cooperation of individual landowners to properly execute. A distinct area plan with a unique district overlay could be created to cover these various properties, with the goal of implementing an overall vision for the area. Collectively, these properties under a combined plan would be expected to achieve considerably higher overall values than if developed independently of each other. An overall master plan could include separate plans for each district, though the goal should remain to create connectivity and a clear identity of this area as the core of Estero. A successful town center would include several destinations, walkable blocks, interconnected streets, attractive development, and public greens.

Previous proposals to develop a Downtown Estero or an Estero Town Center were not planned at a large enough scale to provide a comprehensive planning area with multiple mixed-use districts. These proposed developments were additionally brought forward during unfavorable economic conditions.

The \$225-million Coconut Point open-air mall, located on 116 acres of the 500-acre Coconut Point Master Planned Development, currently acts as the Main Street for the Estero community with its pedestrian-friendly design and mix of entertainment, shopping, and dining options designed around 18 acres of lakes. Though built a year prior

to the global financial crisis, the development and its associated retail has been successful overall.

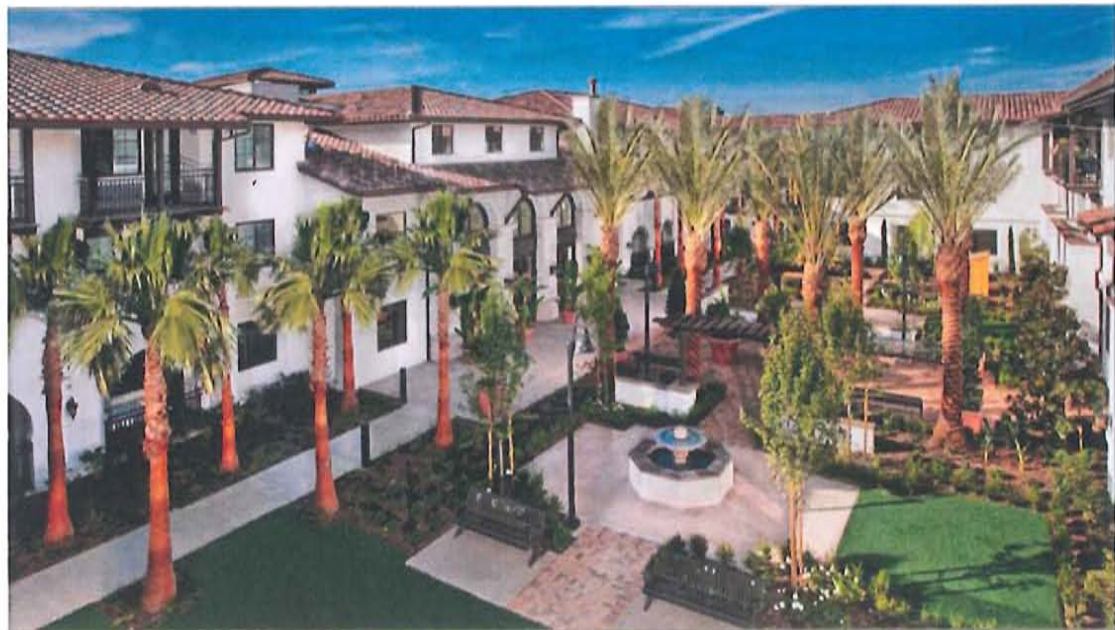


Current economic trends and future market prospects in Estero make the feasibility of town-centric development more likely in the near future. Based on a review of historical and forecasted growth trends, Estero is expected to see an increasing annual growth rate from 2014 to 2020. Constraints on this growth could come from a limited future supply of residential land and an above average increase in median home prices. The availability of future land and the option to provide a mix of residential building types will be essential for developers to meet the market demand for both workforce and retirement housing options.

As part of the central business district, the entertainment district would be established to focus primarily on dining and small boutique shopping venues in a walkable environment. The Town Center design would include connectivity between all the districts to allow more synergy to increase the overall economic viability of the Downtown. Residential units could be carefully integrated in the wellness and entertainment districts to provide a carefree, urban-living option for those seeking to live in immediate proximity to goods and services, in a low-maintenance, lock-and-leave lifestyle. The following is an example of a well-designed senior housing development with building types that could be integrated into a residential and/or health and wellness district in Estero.



This national award-winning project, located in Southern California, has a very impressive density of 46 units per acre.



The plan for a multi-district town center would most likely require the cooperation of individual landowners to properly execute. A distinct area plan with a unique district overlay could be created to cover these various properties, with the goal of implementing an overall vision for the area. Collectively, these properties under a combined plan would

be expected to achieve considerably higher overall values than if developed independently of each other. An overall master plan could include separate plans for each district, though the goal should remain to create connectivity and a clear identity of this area as the core of Estero. A successful town center would include several destinations, walkable blocks, interconnected streets, attractive development, and public greens.

The size and scale of the buildings within the various districts will depend on their use, the amount of total land available within the districts, and the timing and phasing of development. The Hertz headquarters and a potential hospital facility would create larger-scale buildings early in the creation of a multi-district Downtown. Retail, commercial, and residential uses may be phased more slowly based on market conditions. An appropriate scale for mixed-use development in Downtown Estero may be the scale of Worth Avenue in West Palm Beach (picture follows).

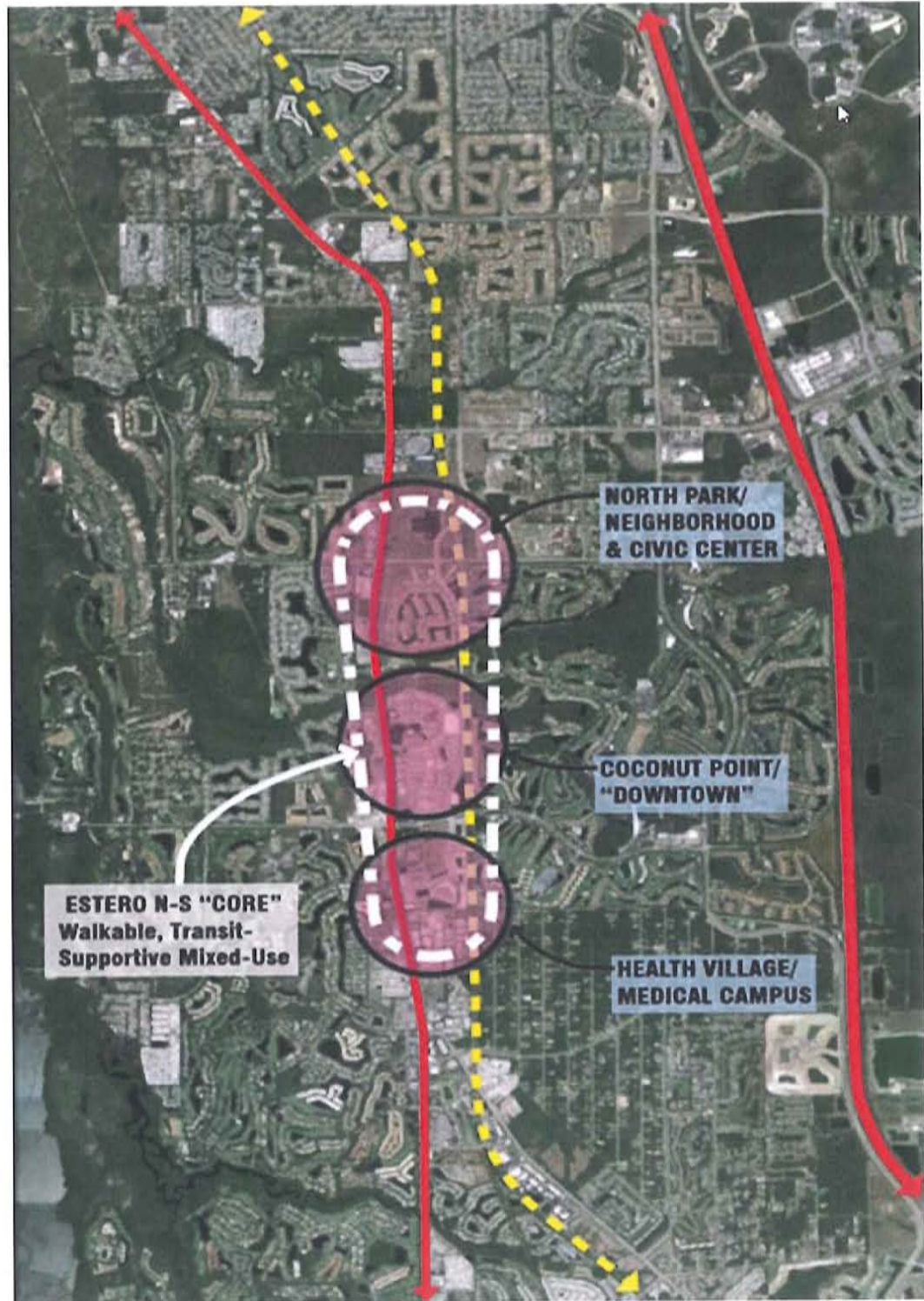


Low-rise to mid-rise building types can be integrated at this scale very attractively, creating an enjoyable pedestrian environment for all age groups.

The map on the following page shows the potential activity centers located along US-41 in a proposed multi-district plan for a Downtown Estero.

The south district would include a medical/health district anchored by an acute hospital facility and surrounded by complementary uses such as medical offices, rehabilitation centers, and assisted care facilities. This district would transition to the north into primary business district which includes Coconut Point Mall and the future Hertz headquarters. This central business district would be a walkable, transit-supportive district capable of supporting an array of mixed-uses including corporate offices, select retail, dining, and housing. Connectivity with existing uses will be essential to create a vibrant commercial core. This connectivity will transition from the business district to the neighborhood and civic center district to the north.

This district will combine the recreational opportunities provided by the Estero Community Center and Koreshan Park with that of new residential units and future civic uses. The creation of a town-centric plan would facilitate the future development of vacant mixed-use parcels located along US-41 in Estero. More importantly, these properties could be developed at potentially higher values than would be achieved by individual, insular projects. The community would further benefit from an identifiable central corridor offering shopping, dining, entertainment, recreation, wellness, lifestyle, and economic opportunities within Estero.



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The data sources utilized in the creation of this report are considered both credible and reliable. No guarantees are made by the author as to the accuracy of secondary data resources.

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February 20, 2014

Peter Blackwell
Department of Community Development
1500 Monroe Street, 2nd Floor
Fort Myers, FL 33902

Re: ESTERO APARTMENTS
CPA2013-00008
CPS Application (Small Scale)

Dear Mr. Blackwell,

This letter is submitted in response to your January 31, 2014 sufficiency letter regarding the above-referenced application. The following responses and attached material are provided to address your comments:

II A. a TYPE, Text Amendment

The proposed request would result in 8.57 acres of Intensive Development category in the Estero Planning District. Lee Plan Table 1(b) does not currently allocate any acreage to this category. Therefore please provide an amended application that proposes a text change to Table 1(b).

Response: The application has been amended to reflect a text change to adjust the Year 2030 Allocations found in Table 1(b). This adjustment transfers residential allocation from Lehigh Acres / Central Urban Future Land Use Category to Estero / Intensive Development Future Land Use Category to accommodate the proposed 8.57-acre multifamily project.

According to the Lee County Local Planning Agency Position Paper on Lehigh Acres (dated December 16, 2011 and attached for reference), Lehigh is one of the largest platted communities in Florida with over 120,000 lots which calculates to a projected population that could exceed 350,000. Today over 70% of Lehigh is designated as Urban Community, with standard density allowed ranging from 2 to 6 units per acre and an actual average density of 0.4 units per acre. One quarter of Lehigh Acres is designated Central Urban (considered the "urban core"), which is intended for residential, commercial, public, quasi-public and light industrial uses. The Central Urban standard allowable density range is 5 to 10 units per acre, however the actual average density is less than one unit per acre.

One of the main obstacles identified for Lehigh Acres within the Position Paper is insufficient commercial uses or facilities to serve the people living in Lehigh Acres. Being the "urban core" for the community, the Central Urban designated lands are suited to accommodate this needed commercial intensity. It is beneficial to the community for land within the Central Urban area to be used for commercial development rather than for continued proliferation of residential housing.

On the other hand, according to the Estero Community Market Assessment by Richard F. Hunt of Peloton Research Partners (a copy of which was included in the original application submittal), Estero is a fast-growing area with readily available urban services, an abundance of commercial land and a shortage of multifamily housing. Thus the transfer of density from the Lehigh Acres Central Urban residential allocation to Estero for needed multifamily residential use is an appropriate shift that is needed to support Estero's growing workforce and to sustain the existing and anticipated commercial uses.

A strikethrough-underline version of Table 1(b) is attached with the adjustment reflecting the shift in allocation from 21 acres of Central Urban designated land in Lehigh to 9 acres of Intensive Development designated land in Estero. This calculation is based on the proposed population increase in Estero of 182 persons generated by assumed density of 15.7 units per acre and community occupancy rate of 0.62 and community persons per household of 2.20. The calculated population of 182 persons would have occupied 21 acres of Central Urban designated land in Lehigh based on assumed density of development within Lehigh's Central Urban area of 3.7 units per acre, with a community occupancy rate of 0.92 persons per unit and 2.52 persons per household. The transfer of residential allocation of 21 acres from Lehigh's Central Urban designation is a negligible amount of the community's 8,200 acres of Central Urban designated land (0.256% thereof), and large parcels can be identified within the Central Urban designated area such as the FGUA Wastewater Treatment Plant including 50 acres of ponds designated Central Urban that will not consume residential development capacity.

II A. b. 1. TYPE, Future Land Use Map Series Amendment

Map amendments require the submittal of a complete list, map, and two sets of mailing labels, for all property within 500 feet of the perimeter of the subject parcel.

The applicant needs to provide two sets of mailing labels for notification purposes. The applicant supplied only photocopies of mailing labels.

Response: Two sets of mailing labels are attached as requested.

The legal description provided by the applicant is insufficient. Please provide:

1. A certified metes and bounds legal description must be submitted specifically describing the entire perimeter boundary of the property with accurate bearings and distances for every line.

Response: The legal description has been modified as requested, and is provided attached.

2. A sketch to the state plane coordinate system for the Florida West Zone (North America Datum of 1983/1990 Adjustment) with two coordinates, one coordinate being the point of beginning and the other an opposing corner.

Response: The sketch has been modified as requested, and is provided attached.

No wetlands appear to be present but if the subject property contains wetlands or the proposed amendment includes more than one land use category. please provide a metes and bounds legal description, as described above, in addition to the perimeter boundary of the property for each wetland or future land use category.

Response: The request does not require additional legal description information to delineate wetlands or future land use categories. The subject property is legally cleared and filled, and no wetlands are onsite as verified by the FLUCFCS mapping, provided as an attachment. The subject site is not proposed for multiple future land use categories, a single category of Intensive Development is proposed for the subject site.

IV A. 9. General Information and Maps

If applicant is not the owner, a letter authorizing the applicant to represent the owner.

The applicant has provided an affidavit from the applicant. Please provide an authorization from the landowner.

Response: An affidavit signed by the owner authorizing the applicant and agents to represent the owner is provided as requested, attached.

IV B. 2. c. Public Facilities Impacts.

Provide an Existing and Future Conditions Analysis for Surface Water/Drainage Basins

The applicant has not provided sufficient analysis of surface water and drainage basins on the site. The application refers to an exhibit from the CPD application that is historic and recent aerials of the subject property: This is not sufficient for the application. The application also refers to a proposed modification of the water management district permit. Please provide a depiction of this proposed modification.

Response: The requested surface water and drainage basins analysis is provided, please see attached.

IV B. 2. d. Public Facilities Impacts

Provide an Existing and Future Conditions Analysis for Parks, Recreation, and Open Space

The applicant has not provided sufficient analysis of the impact of the proposed number of residents on parks and recreation. Please provide this.

Response: The requested parks and recreation analysis is provided, please see attached.

IV B. 3. a. Public Facilities Impacts

Provide a letter from the appropriate agency determining the adequacy/provision of existing/proposed support facilities, including Fire protection with adequate response times.

Please provide a letter from the service provider for fire protection.

Response: Please see the attached Letter of Availability from the Estero Fire District.

IV B. 3. b. Public Facilities Impacts

Provide a letter from the appropriate agency determining the adequacy/provision of existing/proposed support facilities, including, Emergency medical service (EMS) provisions.

Please provide a letter from the EMS service provider.

Response: Please see the attached Letter of Service Availability from the Division of Emergency Medical Services.

IV B. 3. c. Public Facilities Impacts

Provide a letter from the appropriate agency determining the adequacy/provision of existing/proposed support facilities, including Law enforcement.

Please provide a letter from the service provider for law enforcement.

Response: Please see the attached Letter of Service Availability from the Lee County Sheriff's Office.

IV B. 3. d. Public Facilities Impacts

Provide a letter from the appropriate agency determining the adequacy/provision of existing/proposed support facilities, including Solid Waste.

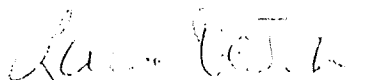
Please provide a letter from the service provider for solid waste.

Response: Please see the attached Letter of Service Availability from the solid waste provider, WastePro.

Please also note:

- The Comprehensive Plan Amendment application is updated to reflect the density calculation of 8.57 acres x 14 units per acre = 119 units (rather than rounded to 120 units). Please see attached.
- A CD containing all submittal documents is also attached.

Sincerely,
JOHNSON ENGINEERING, INC.



Laura DeJohn, AICP
Director of Planning & Landscape Architecture

cc: Steve Hartsell

**TABLE 1(b)
Year 2030 Allocations**

Future Land Use Classification		Lee County Totals	Alva	Boca Grande	Bonita Springs	Fort Myers Shores	Burnt Store	Cape Coral	Captiva	Fort Myers	Fort Myers Beach	Gateway/Airport	Daniels Parkway
Residential By Future Land Use Category	Intensive Development	1,367	0	0	0	20	0	27	0	250	0	0	0
	Central Urban	14,787	0	0	0	225	0	0	0	230	0	0	0
	Urban Community	18,425	520	485	0	637	0	0	0	0	0	0	0
	Suburban	16,623	0	0	0	1,810	0	0	0	85	0	0	0
	Outlying Suburban	4,105	30	0	0	40	20	2	500	0	0	0	1,700
	Sub-Outlying Suburban	1,548	0	0	0	367	0	0	0	0	0	0	0
	Industrial Development	79	0	0	0	0	0	0	0	39	0	20	0
	Public Facilities	1	0	0	0	0	0	0	1	0	0	0	0
	University Community	850	0	0	0	0	0	0	0	0	0	0	0
	Destination Resort Mixed Use Water Dependent	8	0	0	0	0	0	0	0	0	0	0	0
	Burnt Store Marina Village	4	0	0	0	0	4	0	0	0	0	0	0
	Industrial Interchange	0	0	0	0	0	0	0	0	0	0	0	0
	General Interchange	42	0	0	0	0	0	0	0	0	0	0	2
	General/Commercial Interchange	0	0	0	0	0	0	0	0	0	0	0	0
	Industrial/Commercial Interchange	0	0	0	0	0	0	0	0	0	0	0	0
	University Village Interchange	0	0	0	0	0	0	0	0	0	0	0	0
	New Community	900	0	0	0	0	0	0	0	0	0	900	0
	Airport	0	0	0	0	0	0	0	0	0	0	0	0
	Tradeport	9	0	0	0	0	0	0	0	0	0	9	0
	Rural	8,313	1,948	0	0	1,400	636	0	0	0	0	0	1,500
	Rural Community Preserve	3,100	0	0	0	0	0	0	0	0	0	0	0
	Coastal Rural	1,300	0	0	0	0	0	0	0	0	0	0	0
	Outer Islands	202	5	0	0	1	0	0	150	0	0	0	0
	Open Lands	2,805	250	0	0	0	590	0	0	0	0	0	120
	Density Reduction/Groundwater Resource	6,905	711	0	0	0	0	0	0	0	0	94	0
Conservation Lands Uplands	0	0	0	0	0	0	0	0	0	0	0	0	
Wetlands	0	0	0	0	0	0	0	0	0	0	0	0	
Conservation Lands Wetlands	0	0	0	0	0	0	0	0	0	0	0	0	
Total Residential	81,373	3,464	485	0	4,500	1,250	29	651	604	0	1,023	3,322	
Commercial	12,793	57	52	0	400	50	17	125	150	0	1,100	440	
Industrial	13,801	26	3	0	400	5	26	0	300	0	3,100	10	
Non Regulatory Allocations													
Public	82,252	7,100	421	0	2,000	7,000	20	1,961	350	0	7,500	2,416	
Active Agriculture	17,027	5,100	0	0	550	150	0	0	0	0	0	20	
Passive Agriculture	45,859	13,549	0	0	2,500	109	0	0	0	0	1,491	20	
Conservation (wetlands)	81,948	2,214	611	0	1,142	3,236	133	1,603	748	0	2,809	1,719	
Vacant	22,122	1,953	0	0	226	931	34	0	45	0	300	20	
Total	357,175	33,463	1,572	0	11,718	12,731	259	4,340	2,197	0	17,323	7,967	
Population Distribution*	495,000	5,090	1,531	0	30,861	3,270	225	530	5,744	0	11,582	16,488	

* Population for Unincorporated Area of Lee County

TABLE 1(b)
Year 2030 Allocations

Future Land Use Classification		Iona/ McGregor	San Carlos	Sanibel	South Fort Myers	Pine Island	Lehigh Acres	Southeast Lee County	North Fort Myers	Buckingham	Estero	Bayshore
Residential By Future Land Use Category	Intensive Development	0	0	0	660	3	42	0	365	0	9	0
	Central Urban	375	17	0	3,140	0	8,179 0,200	0	2,600	0	0	0
	Urban Community	850	1,000	0	860	500	13,013	0	0	110	450	0
	Suburban	2,488	1,975	0	1,200	675	0	0	6,690	0	1,700	0
	Outlying Suburban	377	0	0	0	600	0	0	382	0	454	0
	Sub-Outlying Suburban	0	25	0	0	0	0	0	140	66	0	950
	Industrial Development	5	5	0	10	0	0	0	0	0	0	0
	Public Facilities	0	0	0	0	0	0	0	0	0	0	0
	University Community	0	850	0	0	0	0	0	0	0	0	0
	Destination Resort Mixed Use Water Dependent	8	0	0	0	0	0	0	0	0	0	0
	Burnt Store Marina Village	0	0	0	0	0	0	0	0	0	0	0
	Industrial Interchange	0	0	0	0	0	0	0	0	0	0	0
	General Interchange	0	0	0	0	0	0	15	7	0	6	12
	General/Commercial Interchange	0	0	0	0	0	0	0	0	0	0	0
	Industrial/Commercial Interchange	0	0	0	0	0	0	0	0	0	0	0
	University Village Interchange	0	0	0	0	0	0	0	0	0	0	0
	New Community	0	0	0	0	0	0	0	0	0	0	0
	Airport	0	0	0	0	0	0	0	0	0	0	0
	Tradeport	0	0	0	0	0	0	0	0	0	0	0
	Rural	0	90	0	0	190	14	0	500	50	635	1,350
	Rural Community Preserve	0	0	0	0	0	0	0	0	3,100	0	0
	Coastal Rural	0	0	0	0	1,300	0	0	0	0	0	0
	Outer Islands	1	0	0	0	45	0	0	0	0	0	0
	Open Lands	0	0	0	0	0	0	0	45	0	0	1,800
Density Reduction/Groundwater Resource	0	0	0	0	0	0	4,000	0	0	0	2,100	
Conservation Lands Uplands	0	0	0	0	0	0	0	0	0	0	0	
Wetlands	0	0	0	0	0	0	0	0	0	0	0	
Conservation Lands Wetlands	0	0	0	0	0	0	0	0	0	0	0	
Total Residential		4,104	3,962	0	5,870	3,313	21,248 21,269	4,015	10,729	3,326	3,254 3,245	6,212
Commercial		1,100	1,944	0	2,100	226	1,420	68	1,687	18	1,700	139
Industrial		320	450	0	900	64	300	7,246	554	5	87	5
Non Regulatory Allocations												
Public		3,550	3,059	0	3,500	2,100	15,289	12,000	4,000	1,486	7,000	1,500
Active Agriculture		0	0	0	0	2,400	0	7,171	200	411	125	900
Passive Agriculture		0	0	0	0	815	0	18,000	1,556	3,619	200	4,000
Conservation (wetlands)		9,306	2,969	0	188	14,767	1,541	31,359	1,317	336	5,068	882
Vacant		975	594	0	309	3,781	8,106 8,085	470	2,060	1,000	800 -899	530
Total		19,355	12,978	0	12,867	27,466	47,904	80,329	22,103	10,201	18,234	14,168
Population Distribution*		34,538	36,963	0	58,363	13,265	164,699	1,270	70,659	6,117	25,995	8,410
							164,517				25,577	

* Population for Unincorporated Area of Lee County

**New Horizon 2035: Lee Plan Update
Local Planning Agency Position Paper
Lehigh Acres Issue Paper
December 16, 2011**

On March 1, 2011 the Lee County Board of County Commissioners (BoCC) adopted the New Horizon 2035: Evaluation and Appraisal Report (EAR). Many concepts and issues raised in the EAR apply to the Lehigh Acres Planning Community. This community is the sole focus of this position paper.

Background

Lehigh Acres is located in eastern Lee County and encompasses 96 square miles, about 12% of Lee County's land area. Initial development of Lehigh Acres began in the 1950s. Lehigh Acres was originally an 18,000-acre cattle ranch purchase as a tax shelter by Chicago businessman Lee Ratner. The Lehigh Development Corporation platted most of Lehigh Acres into separate single-family lots in the 1960s. As a result, Lehigh Acres is one of the largest platted communities in Florida – over 120,000 lots and a projected population of over 350,000 people.

In 1990, the Lehigh Development Corporation requested that Lee County formally recognize that the platted lands in Lehigh Acres were vested for development rights. In 1992 a stipulation agreement was reached that vested the majority of Lehigh Acres property from meeting concurrency requirements.

Future Land Use Designation

The 1984 Lee Plan identified Lehigh Acres as an urban area and assigned the Future Land Use designation of Urban Community and Central Urban. Mostly, that is still the case today.

Over 70 percent of Lehigh is designated as Urban Community – a category described as having a distinctly urban character with predominant land uses identified as residential, commercial, public, quasi-public, and light industrial uses. Residential standard densities range from two dwelling units an acre to six dwelling units an acre, with a maximum of 10 units an acre. The current average density in Lehigh Acres for those areas designated Urban Community is less than 0.4 dwelling units an acre.

Central Urban is characterized as the “urban core” of the County. This designation covers approximately one quarter of Lehigh Acres and encases much of Lee Boulevard, Joel Boulevard and Homestead Road. Central Urban is intended for residential, commercial, public, quasi-public, and light industrial uses. The standard density range is from five dwelling units per acre to ten dwelling units per acre, and a maximum density of 15 dwelling units an acre. The average density in the Central Urban area of Lehigh Acres is less than one dwelling unit per acre.

Lehigh's Vision

The planning firm Wallace Roberts & Todd prepared the "Lehigh Acres Comprehensive Planning Study" in 2009 – taking on identified challenges including infrastructure shortcomings, such as minimally paved roads in remote sections of the community, lack of water and sewer service throughout the community, and a canal system which prevents connections between communities.

A number of new strategies were identified including consolidating development patterns by directing growth, reserving land for non-residential uses, guiding infrastructure through a "tier" system, and utilization of more urban and less suburban downtown, neighborhood and community centers.

Based on the study, and the input of the community, the following vision for Lehigh Acres was incorporated into the Lee Plan, including the overarching goal of transforming the community from a platted lands community to a sustainable community of choice.

"A 'sustainable community of choice' is comprised of a collection of unique and inviting neighborhoods with involved citizens, a healthy environment, housing and employment opportunities, a full range of public services, and an efficient multi-modal transportation network connecting adjacent uses and neighboring communities. Residents will be encouraged to live a healthy and active lifestyle and will be provided opportunities to connect to the natural environment and their neighbors. This is the community vision of Lehigh Acres."

GOAL 32: LEHIGH ACRES. *To ensure that continued development and redevelopment within the Lehigh Acres Planning Community converts this largely single use, antiquated pre-platted area into a vibrant residential and commercial community consisting of: safe and secure single family and multi-family neighborhoods; vibrant commercial and employment centers; pedestrian friendly mixed-use activity centers and neighborhood nodes; with adequate green space and recreational opportunities.*

The main obstacles to making the vision come true can be summarized into three main areas: 1. The legacy of a pre-platted community; 2. Too much single-family, no diversity of housing products; and 3. Insufficient commercial uses or facilities, to serve the people living in Lehigh Acres.

Problem Identification

As part of the EAR process in April and May 2010, small-group workshops were held with residents and business owners to learn what issues and topics they wanted to address in the Lee Plan. At the Lehigh Acres workshop on May 5, 2010 many expressed specific concerns in Lehigh Acres, including the need to foster a unique community identity, more opportunities for commercial retail and employment, pedestrian friendliness, the appearance of major roads such as Lee Boulevard, inadequate public services, improved communications with county

government, divisions within the community, code enforcement issues, crime, blight, changing demographics, bad economic conditions, water/sewer utilities (or lack of services).

In 2009, sale prices of homes in Lehigh Acres were 80 percent off their peaks. Foreclosures have soared in the area, as has unemployment. The February 7, 2009 *New York Times* article "In Florida, Despair and Foreclosures" captured a portion of this at the beginning of the nation's housing and financial crisis. It also noted President Obama visited Southwest Florida during his first 100 days in office, recognizing this was a region at the epicenter of the economic downturn.

Constraints

On October 14, 2011 the Florida Chapter of the American Planning Association sponsored a program – known as *Plat-a-Palooza* addressing platted communities such as Lehigh Acres, Cape Coral and Port Charlotte. Some regulatory challenges were identified including:

1. The State's definition of 'antiquated subdivision' which appears in the Community Planning Act (HB 7207), does not apply to Cape Coral or Lehigh, or most other platted lands communities statewide;
2. Amendment 8 of the Florida Constitution - adopted in 2006 - imposes a restriction upon local governments and redevelopment authorities to use the power of eminent domain for economic redevelopment purposes;
3. There are no long-term revenue sources or organizations to fund the acquisition of platted lands, at the State, local or regional level.
4. Transfers of development rights programs historically have not been successful in the past, and are difficult to administer for both governments and private developers.
5. Difficulty de-platting or purchasing lots with a large number of property owners, some from around the world, and some who have long abandoned their properties.

Solutions

Potential solutions to problems in platted lands communities such as Lehigh Acres are plentiful, but difficult. Charlotte County's Future Land Use Element, adopted April 26, 2007 admitted there are no "ultimate" solutions but there are tried and true "remedies".

These include: Direct purchase of platted lots; Direct acquisition of targeted lands; Direct purchase with assistance from the State of Florida; New Zoning Categories; Create an organization to handle consolidation and de-platting; Administrative de-platting; Graduated Impact Fees, Tax deed acquisition, Urban service area strategy.

Happening Today

Progress has been made proposing changes to the Land Development Code to address specific issues identified by the community, such as improved commercial signage, landscaping standards, the proliferation of model homes, addressing food vending, duplex design, and street numbering on buildings.

The second part of this effort will tackle proposed mixed use areas throughout the community. Solutions include using “form based” codes rather than traditional zoning. This will allow a better mix of uses, more intensity, and more efficient use of land in urban areas. It’s a similar approach in the existing Lee County Compact Communities Code – which can be used anywhere in the county. Ensite – a local planning firm – is working with Lee County Planning Division staff on this mixed use strategy in Lehigh Acres, starting with three proposed activity centers.

Discussion

The issue of what should be done to address the specific concerns of the Lehigh Acres Planning Community should be considered throughout the Lee Plan. Following this, how can the Lee Plan be modified to address community needs?

Possible answers to these questions will be the focus of the Local Planning Agency’s (LPA) and the Community Sustainability Advisory Committee meetings. Planning staff will lead a discussion about concerns relating to how to promote the County’s adopted vision and relate it to the Lehigh Acres Planning Community.

1. Are the two urban categories appropriate for virtually all of Lehigh Acres? If not, what are appropriate categories? What densities or heights of building are appropriate?
2. Are the “Three Tiers” identified on the Lehigh Acres maps appropriate? If so, how should they be better utilized?
3. What alternative transportation options should Lehigh Acres promote or focus resources on - transit, bicycles, pedestrian, or all of the above?
4. Should urban services and enhancements - such as road paving - continue in areas like Tier 3?
5. Should policies be enacted to limit residential single-family and duplex development (including septic tanks) in areas like Tier 3?
6. Which identified remedies should be tried? Which should not be pursued at this time? (purchase of platted lots; new Zoning categories; creation of an organization or method to handle consolidation and de-platting; administrative de-platting; graduated impact fees, tax deed acquisition, urban service area strategy)
7. What are the local regulatory barriers to better development in Lehigh Acres, including commercial centers and places of employment? What are the state or Federal regulatory barriers to better development in Lehigh Acres, including commercial centers and places of employment?
8. What elements could be part of Lehigh’s identity as a sustainable community of choice? Are health care, culture, arts, educational institutions, sports, or other themes appropriate?

LEHIGH ACRES FUTURE LAND USE MAP

The map is approved for publication of the Future Land Use Map as attached to the Record of Draft Commission on September 17, 2010.

Revised By:

LAND REVISION #	DATE OF ADDITION	EXPLANATION
0001	1/10/2008	1/10/2008
0002	3/2/2008	3/2/2008
0003	6/24/08	6/24/08
0004	8/14/08	8/14/08
0005	6/24/08	6/24/08
0006	7/29/08	7/29/08
0007	8/27/08	8/27/08
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0100	11/10/08	11/10/08

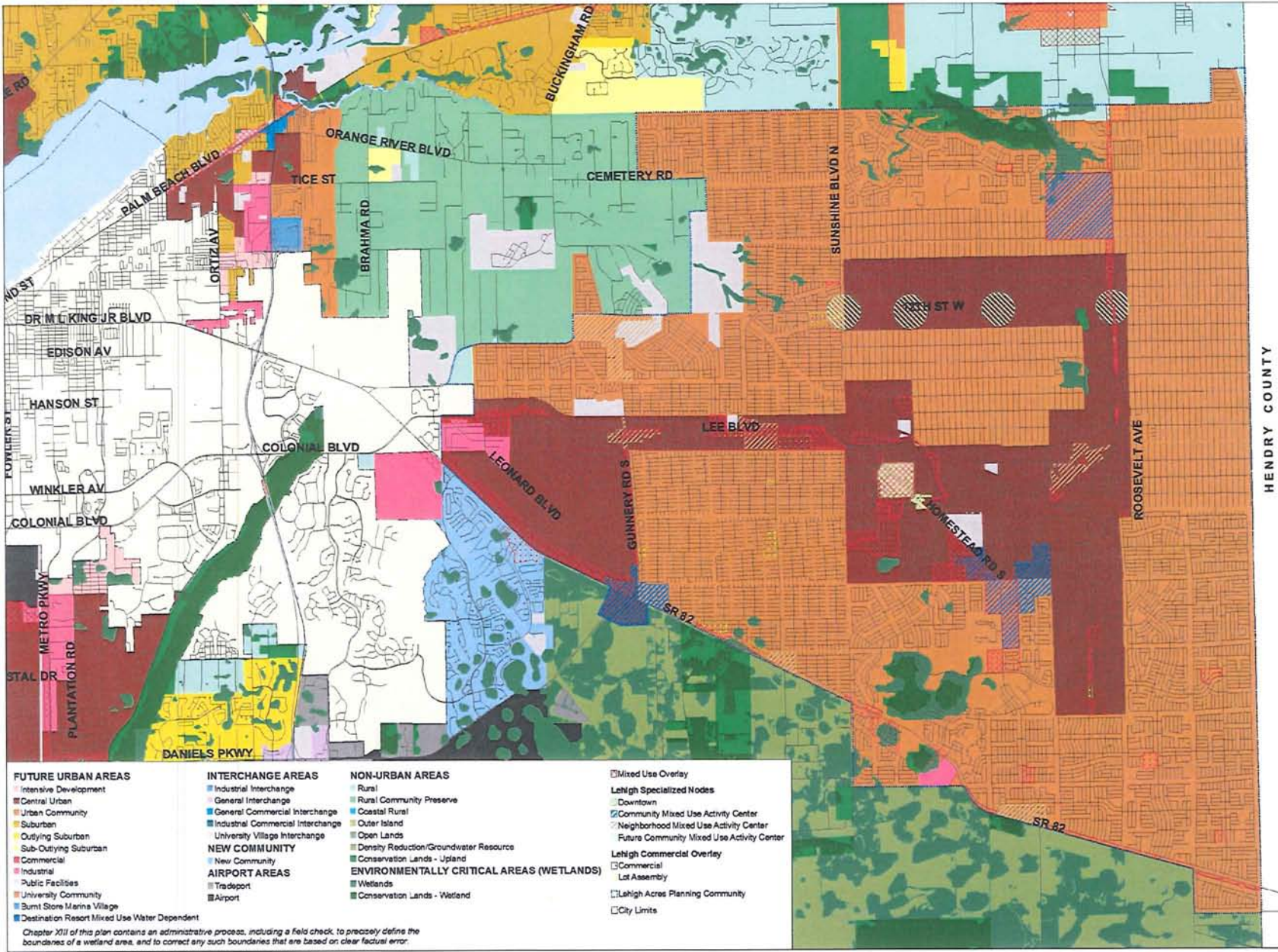
Please see the Lee Plan for additional information regarding all of the various uses, densities, or standards in addition to the requirements of the Lee Plan.

The Planning Commission of Lee, West Virginia Association, Title I, Section 10, and Section 11, and Section 11.1 and 2.2) tracks the land use plan, content, and location of the Lee Plan as of the year 2030. A legend table is provided for each Planning Commission in the Lee Plan.



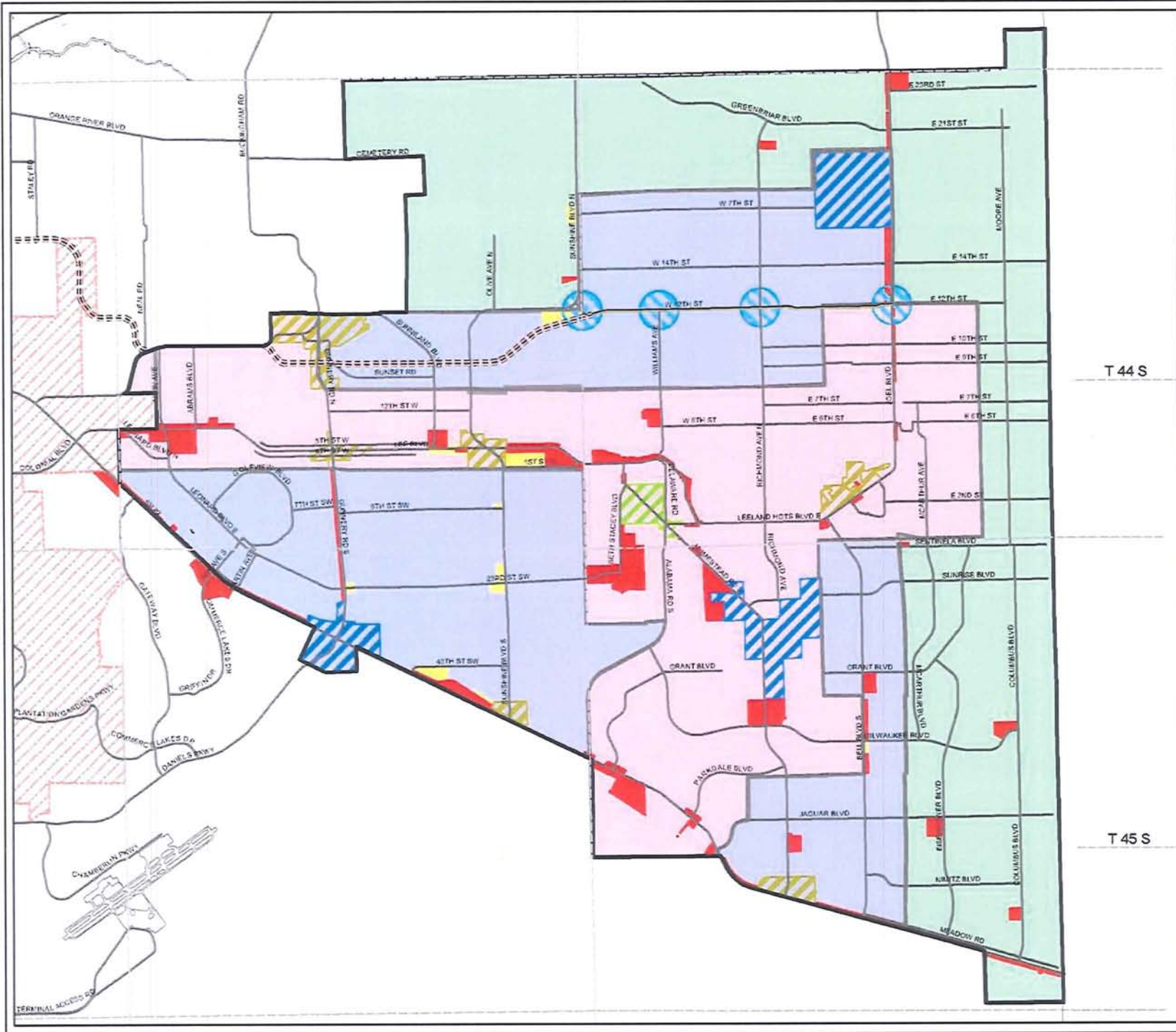
Map Generated: June 2010
City Limits Current as of Generation Date

Lee Plan Map 1
Page 1 of 8



- | | | | |
|---|---|---|---|
| FUTURE URBAN AREAS
<ul style="list-style-type: none"> Intensive Development Central Urban Urban Community Suburban Outlying Suburban Sub-Outlying Suburban Commercial Industrial Public Facilities University Community Burnt Store Marina Village Destination Resort Mixed Use Water Dependent | INTERCHANGE AREAS
<ul style="list-style-type: none"> Industrial Interchange General Interchange General Commercial Interchange Industrial Commercial Interchange University Village Interchange NEW COMMUNITY
<ul style="list-style-type: none"> New Community AIRPORT AREAS
<ul style="list-style-type: none"> Transport Airport | NON-URBAN AREAS
<ul style="list-style-type: none"> Rural Rural Community Preserve Coastal Rural Outer Island Open Lands Density Reduction/Groundwater Resources Conservation Lands - Upland ENVIRONMENTALLY CRITICAL AREAS (WETLANDS)
<ul style="list-style-type: none"> Wetlands Conservation Lands - Wetland | <ul style="list-style-type: none"> Mixed Use Overlay Lehigh Specialized Nodes Downtown Community Mixed Use Activity Center Neighborhood Mixed Use Activity Center Future Community Mixed Use Activity Center Lehigh Commercial Overlay Commercial Lot Assembly Lehigh Acres Planning Community City Limits |
|---|---|---|---|

Chapter XII of this plan contains an administrative process, including a field check, to precisely define the boundaries of a wetland area, and to correct any such boundaries that are based on clear factual error.



SPECIAL TREATMENT AREAS

Lehigh Acres Community Plan Overlays

Legend

- Specialized Mixed Use Nodes**
- Downtown
 - Community Mixed Use Activity Center
 - Neighborhood Mixed Use Activity Center
 - Potential Mixed Use Activity Center

Commercial Overlay Zones

- Commercial
- Lot Assembly

Lehigh Acres Tiers

- Tier 1
- Tier 2
- Tier 3

Additional Information

- Lehigh Acres Planning Community
- Proposed Luckett Road Alignment
- 12th Street/Luckett Road Connection
- Major Roads
- City Limits



Map Generated: July 2010
 City Limits current to date of map generation
 Adoption Date: March 3, 2010
 Effective Date: June 2, 2010
 Adopted by Ordinance No. 10-16



Estero Fire Rescue
21500 Three Oaks Parkway
Estero, Florida 33928
(239) 390.8000
(239) 390.8020 (Fax)
www.esterofire.org

December 30, 2013

Lisa Baughman,
Johnson Engineering, Inc.
2122 Johnson Street
P.O. Box 1550
Fort Myers, Florida 33902

Re: Letter of Availability

Ms. Baughman,

This letter will serve as evidence that Estero Fire Rescue is the service provider for fire suppression services for the property located at 10471 Corkscrew Commons Drive.

This letter will also serve as notice that Estero Fire Rescue has adequate facilities in order to provide the services at this location.

Should you have any questions feel free to contact me at 239-390-8000.

Respectfully,

Phillip Green
Division Chief of Prevention



LEE COUNTY
SOUTHWEST FLORIDA
BOARD OF COUNTY COMMISSIONERS

John E. Manning
District One

Cecil L. Pendergrass
District Two

Larry Kiker
District Three

Brian Hamman
District Four

Frank Mann
District Five

Roger Desjarlais
County Manager

Richard Wm. Wesch
County Attorney

Donna Marie Collins
Hearing Examiner

January 13, 2014

**Lisa Baughman
Johnson Engineering
2122 Johnson St.
Fort Myers, FL 33902**

Re: Letter of Service Availability

Ms. Baughman,

I am in receipt of your letter dated Dec. 20, 2013, requesting a Letter of Service Availability for the development of property at 10471 Corkscrew Commons Drive.

Lee County Emergency Medical Services is the primary EMS transport agency responsible for coverage at the address you have provided. Because we currently serve this area and have a sufficient response data sample, we modeled response times in this vicinity to simulate the anticipated demand and response.

The three primary ambulances to this address are Medic 21, located 0.9 miles south; Medic 25, located 3.1 miles northeast; and Medic 9, located 5.2 miles northwest. All three of these locations are projected to be able to meet existing service standards, as required in County Ordinance 08-16, and no additional impacts are anticipated at this time.

It is our opinion that the service availability for the proposed development of this property is adequate at this time. Should the plans change, specifically the density, a new analysis of this impact would be required.

If you have any questions, please contact me at (239) 533-3961.

Sincerely,

**Benjamin Abes
Deputy Chief, Operations
Division of Emergency Medical Services**

Mike Scott
Office of the Sheriff



State of Florida
County of Lee

Jan. 7, 2014

Lisa Baughman
Johnson Engineering
2122 Johnson St.
Fort Myers, FL 33901

Reference to Project: Estero Interstate Commerce Park CPD

Ms. Baughman,

The proposed amendment to change the land use designation of 8.57 acres within the Estero Planning Community with a street address of 10471 Corkscrew Commons Drive would not affect the ability of the Lee County Sheriff's Office to provide core levels of service at this time.

The change would permit the development of 136 multi-family units on property that was previously approved for retail and restaurant use.

Law enforcement services will be provided from our Delta District office in Bonita Springs. At the time of application for a development order, we request that the applicant provide a Crime Prevention Through Environmental Design (CPTED) report done by the applicant and given to the Lee County Sheriff's Office for review and comments.

Please address further correspondence to me at the address listed below. Please contact Kevin Farrell, Community Program Coordinator of the Crime Prevention Unit, at 477-1635 with any questions.

Respectfully,

Major Kathryn Rairden
Lee County Sheriff's Office
14750 Six Mile Cypress Parkway
Fort Myers, FL 33912



14750 Six Mile Cypress Parkway • Fort Myers, Florida 33912-4406 • (239) 477-1000



February 13, 2014

Johnson Engineering
Post Office Box 1550
Fort Myers, Florida 33902

RE: Trash Service
Estero Planning Community Comprehensive Plan Amendment – 10471 Corkscrew
Commons Drive

Dear Sir:

Please be advised that Waste Pro provides weekly trash and recycling service to 10471
Corkscrew Commons Drive, Estero, Florida. In addition, please be advised that Lee County
Solid Waste Incinerator has sufficient capacity to dispose of solid waste.

Sincerely yours,

A handwritten signature in black ink that reads "Paul Flores". The signature is written in a cursive style with a large, sweeping initial "P".

Paul Flores
Division Manager
Waste Pro USA

Laura DeJohn

From: Gaither, Wayne [WGaither@leegov.com]
Sent: Tuesday, January 21, 2014 1:31 PM
To: Laura DeJohn
Cc: Blackwell, Peter
Subject: CPA2013-00008- Estero Apartments

Laura,

LeeTran has no comments against the Comprehensive Plan Amendment for a change in the Land Use designation which would allow the development to change from commercial to residential. The site falls in the ¼ mile service area of the Route 60 and does fall under the ¾ mile service area for Paratransit Service. In addition, this site will offer a mixture of commercial and residential uses along Corkscrew Commons Drive, in essence a mixed use area of development. However, current aerials show a lack of pedestrian facilities (sidewalks) within this area and this area does not provide easy access for alternative modes of transportation such as connection with LeeTran (except through the intersection of Corkscrew Commons Drive and Corkscrew Road). While LeeTran is not trying to address connectivity issues with other modes of transportation, for this area, solely through this Comprehensive Plan Amendment, this is obviously an opportunity to discuss them.

LeeTran's concerns related to the development in this area center on the lack of connectivity to alternative modes of transportation such as transit or even other non-motorized choices, except at vehicular intersections.

Should you have any other questions please feel free to contact me at your convenience.

Wayne

H. Wayne Gaither
LeeTran, Planning Department
(239) 533-0344
www.rideleetrans.com



Please note: Florida has a very broad public records law. Most written communications to or from County Employees and officials regarding County business are public records available to the public and media upon request. Your email communication may be subject to public disclosure.

Under Florida law, email addresses are public records. If you do not want your email address released in response to a public records request, do not send electronic mail to this entity. Instead, contact this office by phone or in writing.

LETTER OF AUTHORIZATION

TO LEE COUNTY COMMUNITY DEVELOPMENT

The undersigned does hereby swear or affirm that he is the fee simple title holder and owner of record of the fee simple title holders and owners of record of property commonly known as 35-46-25-30-00000.0020 / 10471 Corkscrew Commons Drive, Estero, FL 33928.

The property described herein is the subject of an application for zoning and comprehensive plan amendment. I hereby designate Jeffrey A. Graef, Managing Member, Focus Development LLC to act as applicant and Steve Hartsell, Pavese Law Firm and Johnson Engineering, Inc. to act as agents in the course of seeking the necessary approvals. This authority includes but is not limited to assisting in the preparation of applications, plans, surveys, and studies necessary to obtain zoning and comprehensive plan amendment approval on the site.

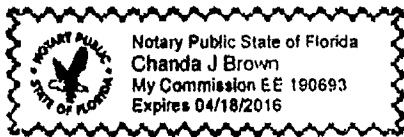
Appalachian Oil Corp

Patricia Carroll
Owner (signature)

PATRICIA CARROLL
Printed Name, Title

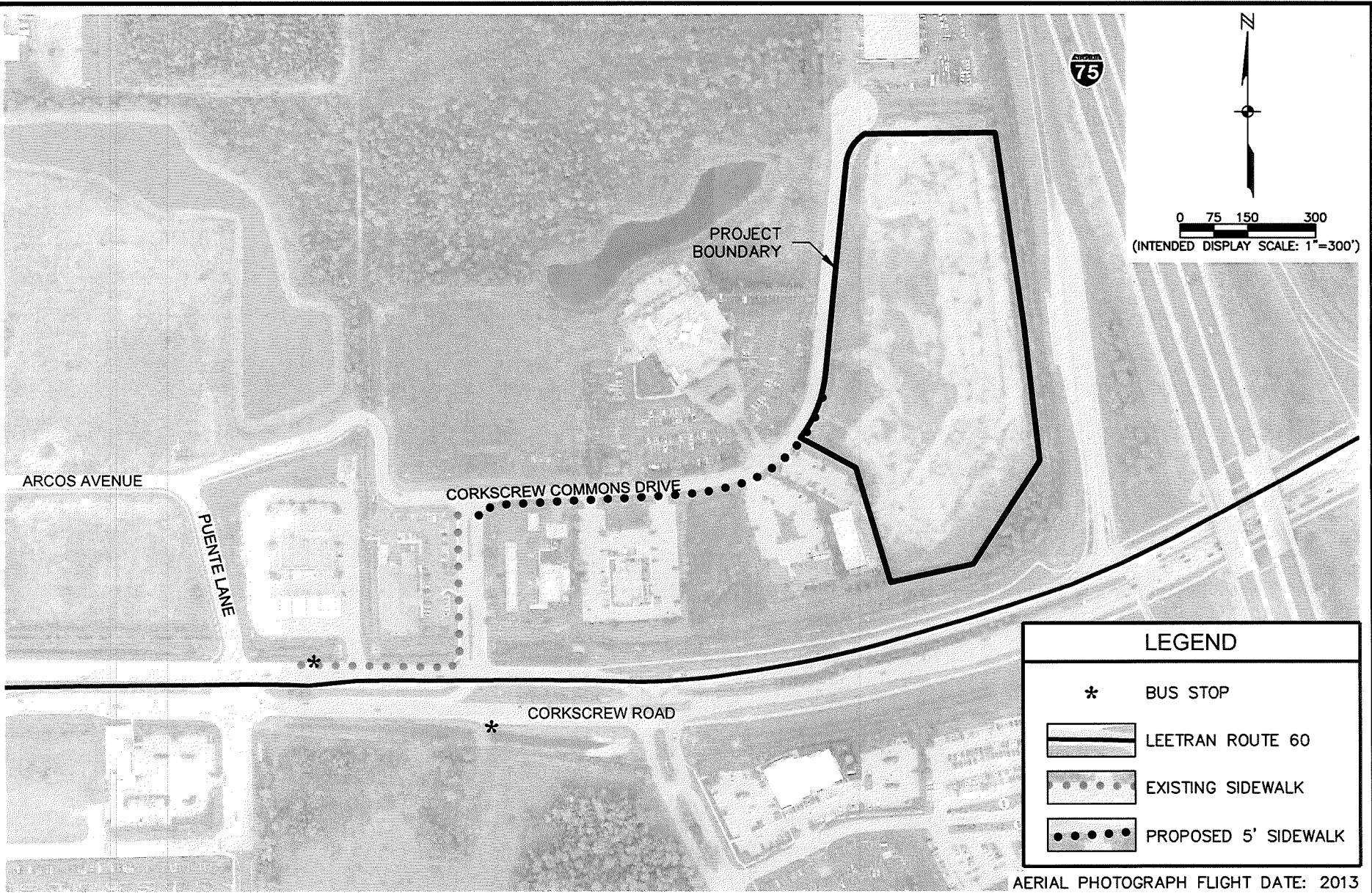
STATE OF FLORIDA
COUNTY OF LEE

The foregoing instrument was sworn to (or affirmed) and subscribed before me on 2/11/2014 (date) by Pat Carroll (name of person providing oath or affirmation), who is personally known to me or who has produced _____ (type of identification) as identification.



Chanda J. Brown
Signature of Notary Public
Chanda J. Brown

\\fms01\Drawings\2013\20139560-000\Planning\Drawings\Exhibits\Pedestrian Improvements.dwg (Sheet) rjs Mar 25, 2014 - 10:21am



LEGEND	
*	BUS STOP
	LEETRAN ROUTE 60
	EXISTING SIDEWALK
	PROPOSED 5' SIDEWALK

AERIAL PHOTOGRAPH FLIGHT DATE: 2013

ESTERO APARTMENTS
LEE COUNTY, FLORIDA

JOHNSON
ENGINEERING

2122 JOHNSON STREET
P.O. BOX 1550
FORT MYERS, FLORIDA 33902-1550
PHONE (239) 334-0046
FAX (239) 334-3661
E.B. #642 & L.B. #642

PEDESTRIAN IMPROVEMENTS

DATE	PROJECT NO.	FILE NO.	SCALE	SHEET
MARCH 2014	20139560-000	35-46-25	1" = 300'	1 OF 1