

# Charlotte County, Florida

## A Platted Lands Development Strategy

May 19–24, 2002  
An Advisory Services Panel Report

ULI—the Urban Land Institute  
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# About ULI—the Urban Land Institute

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**U**LI—the Urban Land Institute is a non-profit research and education organization that promotes responsible leadership in the use of land in order to enhance the total environment.

The Institute maintains a membership representing a broad spectrum of interests and sponsors a wide variety of educational programs and forums to encourage an open exchange of ideas and sharing of experience. ULI initiates research that anticipates emerging land use trends and issues and proposes creative solutions based on that research; provides advisory services; and publishes a wide variety of materials to disseminate information on land use and development.

Established in 1936, the Institute today has more than 17,000 members and associates from 60 countries, representing the entire spectrum of the land use and development disciplines. Professionals rep-

resented include developers, builders, property owners, investors, architects, public officials, planners, real estate brokers, appraisers, attorneys, engineers, financiers, academics, students, and librarians. ULI relies heavily on the experience of its members. It is through member involvement and information resources that ULI has been able to set standards of excellence in development practice. The Institute has long been recognized as one of America's most respected and widely quoted sources of objective information on urban planning, growth, and development.

This Advisory Services panel report is intended to further the objectives of the Institute and to make authoritative information generally available to those seeking knowledge in the field of urban land use.

Richard M. Rosan  
*President*

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# About ULI Advisory Services

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The goal of ULI's Advisory Services Program is to bring the finest expertise in the real estate field to bear on complex land use planning and development projects, programs, and policies. Since 1947, this program has assembled well over 400 ULI-member teams to help sponsors find creative, practical solutions for issues such as downtown redevelopment, land management strategies, evaluation of development potential, growth management, community revitalization, brownfields redevelopment, military base reuse, provision of low-cost and affordable housing, and asset management strategies, among other matters. A wide variety of public, private, and nonprofit organizations have contracted for ULI's Advisory Services.

Each panel team is composed of highly qualified professionals who volunteer their time to ULI. They are chosen for their knowledge of the panel topic and screened to ensure their objectivity. ULI panel teams are interdisciplinary and typically include several developers, a landscape architect, a planner, a market analyst, a finance expert, and others with the niche expertise needed to address a given project. ULI teams provide a holistic look at development problems. Each panel is chaired by a respected ULI member with previous panel experience.

The agenda for a five-day panel assignment is intensive. It includes an in-depth briefing day composed of a tour of the site and meetings with sponsor representatives; a day and a half of hour-long interviews of typically 80 to 100 key community representatives; and a day and a half of formulating recommendations. Many long nights of discussion precede the panel's conclusions. On the final day on site, the panel makes an oral presentation of its findings and conclusions to the sponsor. At the request of the sponsor, a written report is prepared and published.

Because the sponsoring entities are responsible for significant preparation before the panel's visit, including sending extensive briefing materials to each member and arranging for the panel to meet with key local community members and stake-

holders in the project under consideration, participants in ULI's five-day panel assignments are able to make accurate assessments of a sponsor's issues and to provide recommendations in a compressed amount of time.

A major strength of the program is ULI's unique ability to draw on the knowledge and expertise of its members, including land developers and owners, public officials, academicians, representatives of financial institutions, and others. In fulfillment of the mission of the Urban Land Institute, this Advisory Services panel report is intended to provide objective advice that will promote the responsible use of land to enhance the environment.

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# Acknowledgments

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The panel is especially grateful for the gracious southern hospitality extended by Tom Cookingham, Charlotte County’s director of community development, and his staff, who produced the voluminous briefing book, scheduled site visits, arranged interviews, produced numerous maps, and responded promptly to all of the panel’s requests for additional information. The panel would like to extend special thanks and recogni-

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Finally, the panel thanks all of the individuals who took time out of their busy schedules to participate in the interview process. Their candid insights and shared experiences are the key to the success of the panel process.

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# Foreword: The Panel's Assignment

The Charlotte County [Florida] Board of County Commissioners invited an Urban Land Institute Advisory Services panel to provide its expert opinion on the development potential of several hundred small, platted, but undeveloped properties in the Port Charlotte/Murdock area of the county, and to address the many difficult issues surrounding the large number of platted lands in Charlotte County.

The study area consists of a 125-acre portion of Port Charlotte known as Section 41, which is conveniently located between four major roadways in the heart of the county's major commercial and retail area. A regional mall and the county's governmental buildings all are nearby. Directly adjacent to the site are an older industrial park to the east, vacant commercial and office-type properties to the north and south, and vacant residential land to the west.

A canal known as the Como Waterway forms a natural barrier between the site and the residential land to the west. Another canal sits between the study area and the industrial park to the east. Land uses within the study area include a religious institution, an undeveloped park, 13 single-family houses, and one duplex.

What makes this site different from any other site in any other part of the country is the presence of numerous vacant quarter-acre residential lots. These types of lots represent a planning challenge for several Florida counties, and their colorful history provides an interesting glimpse into the wild land development patterns that have defined growth in Florida.

The "platted lands" challenge facing many municipalities began with the massive platting of property in the 1920s. Lots, many on swampland, were platted and sold, mainly to northerners seeking a tropical retirement paradise and ever escalating property values. Known as the Florida "land bubble,"



Location map.

ble," this real estate phenomenon was based on inflated prices from the sale and resale of platted lots. The bubble eventually burst in 1927, with the resulting bank collapses in Florida and Georgia precipitating the Great Depression.

This pattern of boom and bust continued throughout Florida history, leaving in its wake hundreds of thousands of vacant platted lots. Although Lee County leads the southwest Florida region in the number of platted lots, Charlotte County has the second largest number in the state, 263,597 lots on 75,642 acres as of 1983.

The majority of the lots in Charlotte County were platted by the General Development Corporation (GDC), which filed for bankruptcy in 1990 and was required to set up a restitution fund for selling overvalued properties. Four GDC officers spent two years in jail for fraud and conspiracy.

While the county commissioners asked the panel for its expert advice about the subject property, they understand that any proposal must take into account the unique dilemma posed by these platted lands. The panel was mindful of the planning problems created by these lots, and their recommendations directly and indirectly address the issue.

The county's concerns about the subject property are focused on four basic areas:

- Market potential;
- Planning and design;

- Development strategy; and
- Implementation.

While the panel concentrated on these four areas when formulating its recommendations, it also considered the broader implications of the platted lands challenge.

# Overview and Summary of Recommendations

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For “\$10 down and \$15 a month for four years,” almost anyone could purchase a little piece of paradise in beautiful, sunny Florida during the 1950s. This ingenious advertising and marketing scheme from the General Development Corporation promised “a home in the sun for any size pocketbook.”

The company, founded by the Mackle brothers, also would build a two-bedroom home on a purchaser’s lot for \$9,000. But the hundreds of thousands of lots platted by GDC never quite lived up to the advertising hype. The subdivision and sale of these lots continued until the 1980s. A large percentage of these 10,000-square-foot lots remain throughout Florida, many of them in Charlotte County. Most are vacant. The roads constructed to help sell the properties have deteriorated; weeds now grow through the asphalt.

These platted lands have created numerous vexing problems for elected officials and planners. Hundreds of thousands of the small residential lots have self-perpetuating covenants that require the land to remain in residential use. Most were platted before Florida’s growth management laws were enacted and many sit on sensitive environmental lands.

Since such an abundant supply of lots exists, many have not appreciated notably in value. They therefore generate very little in the way of tax revenue, yet require significant county maintenance of existing roads and drainage swales. In addition, most of the lots were sold to individual owners, leaving no large land parcels with a single owner available for replatting and redevelopment.

The sprawling nature of the lots and their layout creates extensive and expensive demands for public infrastructure. Lacking the amenities of many planned retirement communities, these lots hold little appeal for a large percentage of the market looking to retire to Florida. In addition, develop-

ers—who require large contiguous tracts of land to develop the type of product desired by the market today—are discouraged by the land assembly problems posed by the multiple ownership of the lots and the lack of public infrastructure.

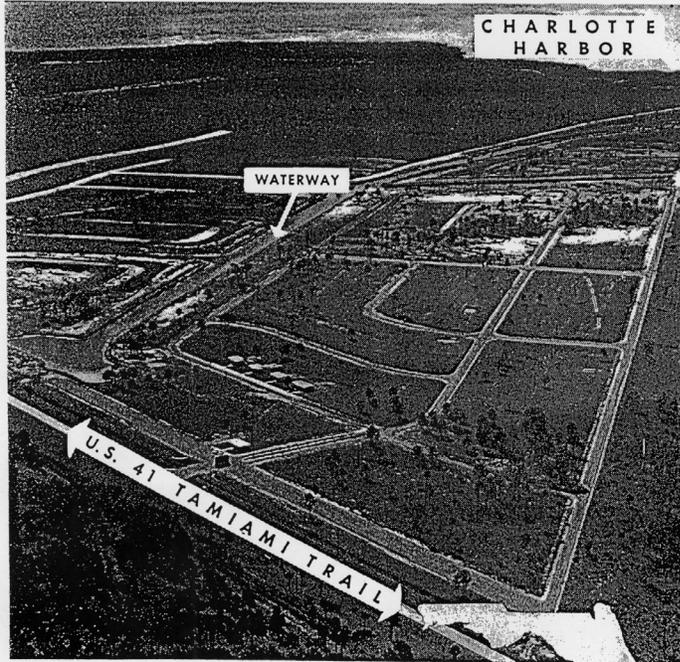
Economic development efforts to generate commercial tax revenues and jobs also are severely hampered by the lack of commercial land available for development, since the covenants requiring residential use of the platted lots limit the amount of commercial land available. The commercial lots that do exist tend to be shallow and located along major roadways, resulting in undesirable, inefficient, and ugly strip development.

With these constraints foremost in their minds, local elected officials and planners are attempting to address current and anticipated population growth issues. Charlotte County is located on Florida’s southwestern coast, on the Gulf of Mexico, approximately 100 miles south of Tampa and 25 miles north of Fort Myers. The Gulf Coast is witnessing significant population growth through a combination of in-migration of northern retirees and the migration of Florida residents fleeing the state’s more densely developed Atlantic Coast. The Gulf Coast community of Naples to the south has seen real estate values skyrocket with the influx of new wealthy residents.

Charlotte County is bounded on the west by the Gulf of Mexico, on the north by Sarasota and DeSoto counties, on the east by Glades County, and on the south by Lee County. The U.S. Census Bureau estimates Charlotte County’s current population at 147,009. The Port Charlotte/Murdock area (the location of the subject property) has an estimated population of 60,000, almost half of the county’s residents. From 1960 to 1990, Charlotte County experienced significant growth, averaging a 10 percent population increase every year. During the 1990s, this slowed to an annual growth rate of 2.3 percent. Since the 2000 census, Charlotte

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This advertisement for homesites in Port Charlotte appeared in *Life* magazine in 1957.

County is estimated to have continued to add approximately 4,200 people per year, an annual growth rate of 3.8 percent. Population growth in the range of 2 to 3 percent is projected for the next decade. The population of neighboring Lee County continues to grow at an even faster rate.

The county seat of Charlotte County is the incorporated city of Punta Gorda, which has a population of approximately 14,000. The Punta Gorda Metropolitan Statistical Area (MSA) includes all of Charlotte County. Several publications have cited the area as one of the best places to live in the United States. Its popularity as a retirement and vacation destination appears likely to continue well into the coming decade. Local officials should be prepared to address the demands created by this continuing growth. The panel was impressed by the county commissioners' foresight in addressing these issues now rather than later, when their options may be more limited.

The panel makes its recommendations for the subject property within this context of continuing and expanding population growth, and with an understanding of the problems created by platted lands. A recurring theme that ran through the panel's discussions while it was in Florida concerned how fortunate the timing of the panel's visit had been. The panelists believe that the explosive and transforming growth taking place to the south of Charlotte County in Lee and Collier counties is definitely on its way north and that the commissioners were wise to plan for this growth in advance.

The panel believes that the county should prepare for this advancing growth by raising its standards for development, expecting and demanding higher-quality projects than it has seen thus far. To attract and ensure such development, the county government should undertake predevelopment efforts that include land assembly and the provision of infrastructure. The panel believes that the county will recoup any investment made in such efforts several times over, through increased commercial tax revenues generated by the new development. The panel believes that the county will pay a high cost if it is *not* proactive in this manner. Continuing with the current method of development will lead to a persistent reliance

on a small residential tax base and low-quality, light industrial uses that tend to be visually unappealing and that generate limited taxes and few jobs.

Charlotte County, like every county in the United States, is involved in an increasingly heated competition to attract major employers and other commercial tax generators. The panel believes the county can do more to attract these businesses. By addressing the two major factors discouraging business relocation to Charlotte County—land assembly and infrastructure provision—the county not only will create highly desirable land value; it also will gain control of the development process, which it can leverage to promote county interests.

Specifically, the panel's recommendations are summarized as follows. Each of these recommendations is discussed in more detail later in this report.

## Planning and Design

The county should begin by preparing a conceptual master plan, which should be followed by a more detailed master plan. The county then should make infrastructure improvements that will pave the way for new development.

The conceptual master plan should:

- Locate civic and public uses in the center of the site;
- Locate visitor uses on the northern side of the site;
- Locate community uses on the southern side of the site; and
- Locate business and flex uses on the eastern side of the site.

The detailed master plan should:

- Create a retail and amenity promenade along the main spine road;
- Enhance the accessibility and connectedness of existing site features;
- Develop clear and consistent design guidelines; and



The panel convenes on the Peace River. From far right, counterclockwise, Debra Stein, Alan Harwood, David Kenyon, Nathan Watson, panel chair Maureen McAvey, Zane Segal, Tom Stone, and Tom Jacobson.

- Create a sense of place.

Crucial on-site infrastructure improvements include the installation of:

- Utility services, roads, and circulation features prior to development; and
- Public amenities as the project is built.

## Development Strategy

The panel proposes a three-phase development process, and recommends that the county undertake the following activities during these phases.

### Phase I: Predevelopment

- Enact a temporary development moratorium and guidelines for the site;
- Dedicate, hire, or contract adequate staff to implement the development proposal;
- Gather and analyze all pertinent data;
- Adopt all necessary enabling legislation;
- Investigate and adopt additional development incentives;
- Establish review procedures that ensure discretionary review by the county;
- Establish a mechanism for the enforcement of design guidelines and property management; and
- Locate civic uses on the site.

### Phase II: Land Assembly

- Undertake an extensive public information program to encourage land donations;

- Where possible, consider land exchanges;
- Acquire tax-delinquent properties;
- Purchase properties;
- As a last resort, use eminent domain to acquire properties; and
- Eliminate deed restrictions.

### Phase III: Site Development

- Enact a conceptual and detailed master plan for the site;
- Determine the county's role in the development process; and
- Develop necessary site infrastructure.

### Implementation

Finally, the county must determine how it will pay for the proposed development. The panel recommends that the county consider:

- Renewing the one-cent sales tax and using a portion of the funds for site development;
- Using funds already dedicated for infrastructure improvements;
- Using monies already dedicated through the Charlotte County Transportation Trust Fund;
- Establishing a tax increment financing (TIF) district on the site; and
- Exploring other sources of funding.

# Market Potential

Approximately 170,000 vacant platted lots—most of them about one-quarter acre in size—can be found in Charlotte County. A 1997 report by the Southwest Florida Regional Planning Council entitled *The Platted Lands Challenge* states that Charlotte County had 263,597 platted lots on 75,642 acres in 1983. In the southwest Florida region, only neighboring Lee County had more platted lots.

These platted lands create obvious difficulties for the county government and for existing homeowners. A huge number of platted lots have covenants that ensure the lots' continued residential use. Yet residential lots traditionally do not generate sufficient taxes to cover the governmental outlays required to support the population's needs, which include schools and libraries, trash removal, road construction and maintenance, stormwater management, sidewalk construction and repair, public utility extension, and so forth. Revenues from taxes paid by commercial uses generally are required to make up the difference. Without these revenues, the county has limited options to raise the funds necessary to support its needs.

Charlotte County's abundance of residential platted lots and the paucity of lots appropriate for commercial uses creates several difficulties for existing homeowners, in addition to the above-mentioned possibility of property tax increases due to revenue shortages. Basic supply and demand principles create a simple value problem: the sheer number of vacant lots available, the interchangeable nature of the lots, and the lack of demand do not support price appreciation. Existing homeowners therefore are unable to benefit from one of the country's greatest wealth builders, real estate value appreciation.

To highlight the severity of the problem faced by the county government, one only needs to look at the county's comprehensive plan and its estimates of the services that may be required by the plat-

ted lots. The comprehensive plan delineates the county's urban services area, which encompasses 215 square miles. If homes eventually were built on all 226,000 lots within this area, Charlotte County staff project a built-out population of 500,000, almost a quadrupling of the current population. The infrastructure and service needs of this projected population base would include:

- More than 50 million gallons of potable water per day for residential, commercial, and industrial needs;
- The capacity to treat almost 38 million gallons of raw sewage per day;
- 39 elementary schools, 15 middle schools, and 11 high schools;
- Vocational/technical schools capable of educating 15,477 students;
- A community college system capable of handling an enrollment of 15,867 students;
- A public library system with nearly 630,000 volumes and an annual operating budget, in 1995 dollars, of more than \$10 million;

An abundant supply of residential lots combined with little demand leads to low land values and limited appreciation.



Most of the roads originally installed to assist in the marketing of Charlotte County's residential lots now run through overgrown vacant lots and are in varying states of disrepair.



- A 412,149-square-foot justice center accommodating eight county court judges and 13 circuit court judges;
- A jail and stockade capable of holding 726 prisoners with a staff of 262;
- A sheriff's office with a combined noncorrectional staff of 1,344 persons, including 797 sworn officers; and
- Fire/emergency medical services departments with a combined staff of 629, including 51 stations and 78 trucks.

This obviously represents a massive, unfunded liability that would require an order-of-magnitude increase in the county's capital expenditures, should all of these lots actually be developed. This level of growth is beyond all reasonable capabilities of the county, as it currently is constituted. A policy statement adopted by the Charlotte Assembly 2001, a citizen-based visioning event sponsored by the Charlotte County Board of County Commissioners, noted "Charlotte County has difficulty keeping its roads, drainage, schools, and other public facilities abreast of population growth. This

is largely due to the state's tax structure in combination with the limited high-value commercial and residential development in the County."

Part of the county commissioners' rationale for inviting this ULI Advisory Services panel to Charlotte County was to ask it to suggest means to help diversify the county's tax base and eliminate its dependence on residential property taxes.

### Platted Lots

Most of the county's vacant platted lots front paved streets, but are not connected to sewer or water lines (and will not be connected in the foreseeable future). The vast majority of these lots were sold by General Development Corporation (GDC) to buyers all across the United States and abroad during the 1950s through the 1980s. Since relatively few of the buyers actually built homes on their properties, today the county features section after section of vacant lots with only a smattering of houses. The vacant lots drain county resources without producing concomitant tax revenue, since—because their resale values are ex-

tremely limited—their fair-market assessable values are so low.

Since GDC focused on platting and selling residential lots, the only commercial properties it created were limited-depth strips fronting arterial roads. This resulted in a pattern of strip retail and office uses that today are unsightly, unpractical, and—because of the numerous access points—dangerous. Very little land was left for the industrial and trade-oriented service businesses that comprise much of the employment within the county.

When the county created its comprehensive land use plan, as required by state legislative mandate, existing uses were codified into zoning designations, which make it even more difficult to change these inefficient land use patterns. The combination of too much residentially platted land and too little commercially platted land is creating ever-increasing strain on the county's financial structure, traffic patterns, and quality of life.

The commissioners asked the panel to address the subject property, a 125-acre tract of mostly residentially platted lots, with reference to the greater issues facing the county. To adequately assess the market potential of this site, the panel found it necessary to analyze and put into context the assets of the state, the region, and the county. From an analysis of these assets, trends emerge that inform the panel of potential markets for the platted lots.

## Florida Trends and Assets

Florida continues to experience dramatic population growth, from both immigration and the continuing influx of retirees. A primary destination for retirees from all around the United States, Florida historically has been the state of choice for many “Eisenhower generation” retirees seeking a milder climate, more affordable homes, and lower taxes.

Florida now is beginning to experience the next wave of incoming retirees: aging baby boomers, who were born after World War II, from 1945 through 1964. These are the children of the Eisenhower generation, sometimes known as the “Kennedy generation.” The leading edge of this

group turns 57 in the year 2002. Known as the most powerful demographic group in U.S. history, baby boomers soon will be reaching retirement and early-retirement age in numbers never before seen. Many are moving to Florida.

This group has attained individual wealth at younger ages than ever before, in large part because of the decadelong economic and stock market booms that lasted into mid-2001. It also has benefited financially from what is being called the greatest transfer of wealth in the history of the United States, as its members inherit their parents' wealth. Key elements that have begun to shape—and that will have increasing influence over—Florida's continued growth include the following:

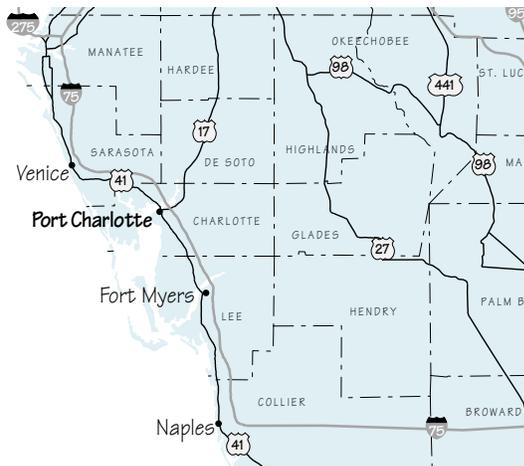
- The continued attractiveness of the Sunbelt as a vacation, first-home, second-home, and retirement destination. Today, people are retiring younger and living longer than ever before. They also are staying active and healthier longer, and thus continue to be drawn to Florida's scenic and recreational amenities.



Charlotte County's temperate climate, water resources, and ecological diversity make it an excellent destination for ecotourists.



Above: Planned communities like this one are popular with retirees seeking a maintenance-free, amenity-rich lifestyle. Architectural controls and landscaping ensure that the community's property values will be maintained. Right: Skyrocketing home prices in nearby Naples and other communities, as well as continuing growth in neighboring Sarasota and Lee counties, likely will increase development pressure in Charlotte County.



- Florida's reputation as a retirement mecca, coupled with the accelerating number of people reaching retirement age. Many retirees seek new careers, typically part-time or full-time ones that are less stressful than the careers from which they have retired. They thus require either workspace within their homes or nearby commercial facilities appropriate to their new careers.
- Access to temperate and attractive water resources, including the Atlantic Ocean, the Gulf of Mexico, bays, harbors, estuaries, swamps, and lakes for recreational boating, fishing, and ecotourism.
- A balmy climate that encourages golf, tennis, swimming, boating, fishing, and other types of recreation year round.

- New development patterns for first- and second-home developments that include a mix of housing styles, types, and prices; a higher level of amenities, landscaping, and architectural control; and access to better shopping, entertainment, and recreational facilities within as well as outside the confines of the developments. There is a clear, growing preference for condominiums and other types of projects in which all maintenance is taken care of by a homeowners association. The presence of such developments tends to steer purchasers away from older platted subdivisions that offer few—or no—amenities.

## Regional Trends and Assets

Located on Florida's Gulf Coast, approximately midway between the cities of Tampa and St. Petersburg and the ritzy resorts around Naples and Marco Island, Charlotte County sits in the middle of two rapidly expanding and developing areas. Regional trends and assets that likely will affect development include the following:

- The pattern of population growth inevitably is moving south from Sarasota County and north from Lee County. Both of these counties are experiencing dramatic population growth from tourists, retirees, and second-home buyers (known locally as "snowbirds"). Both are known for their expansive beaches, gulf-front resorts, and new communities. Charlotte County is not known for any of these features. The rising cost of housing and all types of accommodations in Sarasota and Lee counties, however, is forcing people in search of more affordable housing to explore options in Charlotte County.
- Florida's population is moving, increasingly, from the Atlantic Coast to the Gulf Coast. This westward movement is being driven, in large part, by the high costs of real estate along the Atlantic shore as well as by the increasing urban density there.
- The natural borders of the Gulf of Mexico to the west and agricultural and conservation zones to the east of Interstate 75 have created a narrow pattern of development throughout

southwest Florida, increasing density in the urban services areas as well as the cost of all types of housing and commercial projects.

## Charlotte County Trends and Assets

After looking at statewide and regional trends and assets, the panel focused on how Charlotte County fits into the context of the state and the region. Specific countywide trends and assets include the following:

- Charlotte County contains a large number of properties that offer deep-water access for motorboats and a lesser number of lots—mainly on the county’s barrier islands—that provide deep-water access for sailboats. These deep-water access lots tend to be developed first and at the highest value for both the lot and the resulting home.
- Charlotte County is instituting a broad tourism development program to attract tourists interested in value-added, niche, sports, ecological, water-oriented, fishing, and special-interest activities to the area. The county is planning a referendum to pay for the redevelopment of the baseball stadium formerly occupied by the Texas Rangers as a multiuse sports and entertainment facility. Over the long term, these tourism development programs likely will create additional interest in acquiring property in the county for first and second homes;
- Charlotte County is perceived—correctly—as having excellent medical facilities, which are an attractive amenity for a retirement-age population. In fact, a tour of the county reveals that most of the commercial construction occurring at this time is health related.
- The county is seen as a good value, compared with the high-cost alternatives elsewhere along the East Coast and in southwest Florida.

The county must integrate these factors—which are driving the continued population expansion in Florida in general and in Charlotte County in particular—into progressive, ongoing planning if it is to maintain the quality of life, both for those



Charlotte County’s large number of properties with deep-water access for motorboats is a definite asset.



The Charlotte Regional Medical Center is one of many top-quality medical facilities in the region.

already living in the region and for those who might be drawn to live there in the future.

## Platted Lot Market Potential

A quick look at the status quo—a huge number of vacant platted lots available at extremely low prices, plus ever-accelerating population growth—might lead one to the conclusion that all is well in Charlotte County, if infrastructure needs can be addressed, and that in-migration eventually will fill the county’s vacant areas. Recent patterns of growth, however, suggest otherwise.

Most of the homes being built today are too large to fit on quarter-acre lots that, like the majority of the platted lots in Charlotte County, are not fully served by county water and sewer utilities. Such properties require a well and a septic tank, which—because of their cost and inefficiency—are unpopular with developers and homebuyers. While extending full utilities to a lot increases its cost by a factor of approximately \$10,000, it also increases the lot’s value by at least this amount—if not more—and also makes it much easier to sell.

Many affluent Florida retirees are seeking larger homes and lots located near similar structures. Charlotte County's small platted lots and smaller homes do not meet this market demand.



Luxury condominiums that offer spectacular water views are popular with today's retirees.



Financial factors have caused Charlotte County Utilities to embark upon a slow expansion effort that will leave many platted lots without water and sewer services into the foreseeable future. This renders these thousands of lots virtually worthless and unmarketable.

Today's homebuyers want to be able to choose from a variety of dwelling types, many of which are not well suited to the existing inventory of platted lots, for reasons that include the following:

- As individual wealth continues to grow, people seeking single-family houses in Florida want larger, more attractive homes than was the norm in the past. These larger homes require larger sites. Some need two or more contiguous quarter-acre lots. In newer master-planned communities, homes are being built on even larger lots.
- Many homebuyers are looking for golf-course frontage or estate-size properties of an acre or more. These people tend to prefer living in com-

munities where they are surrounded by similar lots with equivalently sized and priced homes.

- The proliferation of high-cost mid-rise and high-rise condominiums, even in Charlotte County, is indicative of the movement to maintenance-free living in homes with desirable views.
- While most of the existing lot inventory has deed restrictions, these restrictions do not specify minimum home sizes or quality.
- Buyers of new homes consistently prefer waterfront condominiums and homesites, if they can afford the escalating prices of these properties. Lots and buildings that front on harbors and canals both are attractive. Within the latter category, properties with deep-water access are preferred, and thus command a cost premium. Properties that offer access for sailboats—those with deeper water and headroom clearance for masts—also command a premium over those with only motorboat access.
- Many homebuyers prefer having access to a marina that is owned and maintained by the community to the expense, upkeep, and liability associated with owning waterfront property and a private dock.

The vast majority of the existing platted lot inventory in Charlotte County consists of interior lots with no water access of any kind. To further exacerbate the situation, most of these lots are located far from employment centers, commercial corridors, recreational facilities, and medical services.

Additionally, the single-use platting of these large areas does not create—or even allow—the type of community-building facilities inherent in newer communities, such as clubhouses, restaurants, athletic facilities, and walkable commercial districts. These lots are, to a large degree, the wrong product, without the proper infrastructure, sold by high-pressure sales tactics to unsophisticated buyers living far away. They have virtually no resale market or value.

Some precedent exists for private developers to assemble vacant lots, vacate the underlying plats, replat the land into usable parcels, and market it

as a newer, more attractive type of development. However, this process is cumbersome, time consuming, and risky for the private development community, thus limiting the success of attempts to date and those anticipated in the future.

The 125-acre area that the panel was asked to study is typical of Florida's platted but mostly undeveloped lands in several respects. Its location—at a strategic crossroads in the center of the county—however, gives it the potential for uses other than single-family housing.

The county already has up-zoned most of the subject property from single-family residential to

multifamily residential, at a relatively low (for multifamily) density. The county, however, asked the panel to explore opportunities and methodologies to create a “higher and better” use than current or previous zoning would allow. The following section examines the attributes of the site and describes how the county can ensure high-quality development and the highest and best use of the land.

# Planning and Design

The property analyzed by the panel consists of 125 acres—23 blocks—of infill property strategically located at the crossroads of the community. Currently, 95 percent of the site is unproductive in terms of its use and its value to the community. It deserves a higher and better use. Areas bypassed or avoided by development can provide excellent opportunities to reclaim land for productive uses.

The Murdock area, where the subject property is located, is the commercial and functional center of Charlotte County. It is adjacent to Port Charlotte Town Center mall, the county administration building, several major “big box” retailers, and a few significant office buildings. The site thus offers a unique opportunity for a new type of development in the community. It is a logical extension of the county’s current and evolving development framework, and is part of an area slated to be provided

with utilities and growth opportunities over the next three years.

## Site Conditions

### Accessibility

The site is well situated within the county’s transportation network. It can be accessed from multiple directions via arterial and collector roads. Because of its accessibility, the site has the potential to serve as an aesthetic gateway to Charlotte County via I-75 to the east and north, and U.S. 41 from the north.

The intersection of major roadways U.S. 41 and Route 776, as well as Toledo Blade and Collingswood boulevards, makes the site reachable from residential areas throughout the county. Development on the site therefore should serve the needs and desires of residents from the entire county. As Toledo Blade and Veterans boulevards are widened, the site will enjoy an even more advantageous transportation network.

### Visibility

The site is visible from great distances. These vistas should be enhanced to highlight and frame the site. The arrival sequence can provide a series of positive visual impressions. To make a good first impression on visitors to the county, roadway approaches to the site should become entry portals of great beauty. The intent should be to provide inviting and memorable views that will attract visitors and customers. In addition, the unsightly industrial uses on Veterans Boulevard and the commercial uses on U.S. 41 to the east and south should be screened with vegetation. The existing attractive views along El Jobean Road from the west and Toledo Blade Boulevard from the north should be protected.

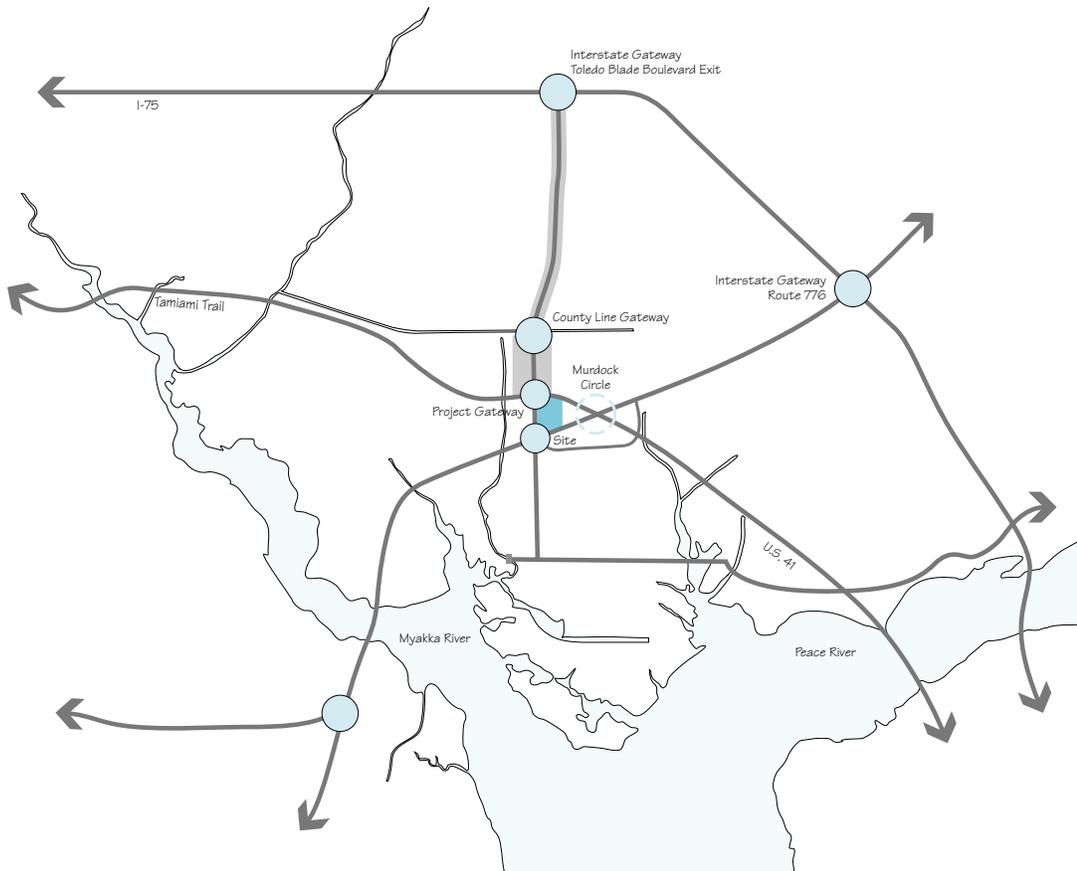
### Open Space

Open spaces can be visually appealing areas that help separate and distinguish built-up areas.



Port Charlotte Town Center—an enclosed mall that currently represents the retail center of Charlotte County—is located adjacent to the subject property.

Site access and gateways. The site is well situated, with access to an extensive transportation network. Gateways are designated at important intersections.



Nighborhoods organized and framed by green spaces contribute to a sense of community.

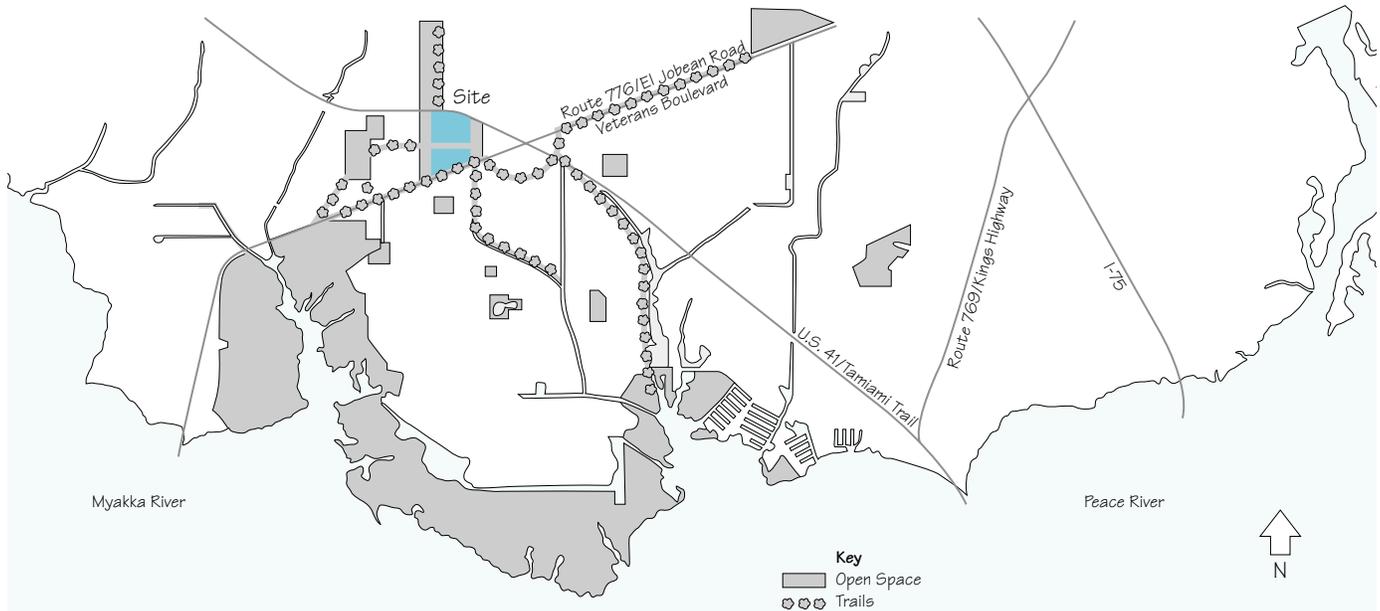
The site offers a unique opportunity to connect to and extend the county's existing open-space network. The site's open-space features can help link some of the county's most desirable natural resources. Isolated open spaces are not as valuable as an environmental corridor. Leftover parcels and forgotten pieces of land—including delinquent properties, sites that are not suitable for development, and excess vacant areas—can be combined to create an open-space network of environmental corridors and recreational amenities.

Developers welcome opportunities to connect their projects physically and visually to a lake, canal, fountain, or other water feature with pedestrian walkways, hiking trails, and/or open spaces because doing so adds value to their projects and their investment. Rediscovering and rehabilitating the county's existing canal system can lead to de-

lightful opportunities, as has been demonstrated throughout Europe.

## Recommendations

The site contains enough land and sufficient scale to create a distinctive sense of place. The property's prime location—with its excellent access to several major roadways, high visibility, and opportunities to connect to the existing open-space system—provide the county with a unique development opportunity that should be leveraged to maximum advantage. The panel recommends that the county begin by creating a conceptual master plan for a town center project. This should be followed by the creation of a more detailed master plan, leading finally to infrastructure improvements. More specifically, the panel recommends that the county take the following actions regarding the planning and design of this property.



On-site open space and trails should be linked to the existing open-space and trails network.

### Create a Conceptual Master Plan

A conceptual master plan should specify a project with a balanced mix of uses and the flexibility to respond to market demands. Multiple uses provide economic diversification, reduce vehicular trips, and create an interesting destination. The conceptual master plan should capitalize on the site's visibility and call for the development of a high-quality, attractive facility at a gateway location. The conceptual plan also should provide for sensitive transitions between uses (including on-site tenants and adjacent activities). The conceptual master plan should:

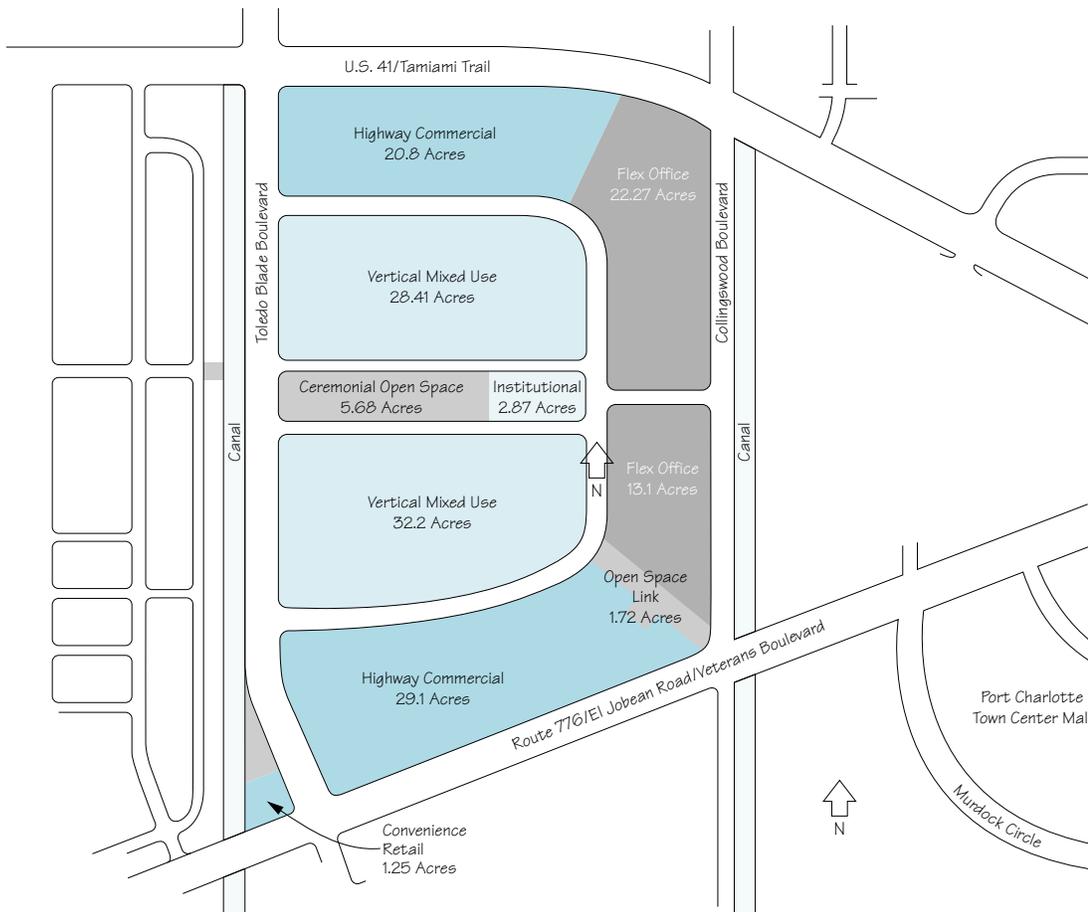
**Locate Civic and Public Uses in the Center of the Site.** Civic and public uses should be located, symbolically, in the center of the site to provide a focal point for the development and to signify the importance of such uses to the community. During its time in Charlotte County, the panel noticed no real sense of a civic center, nowhere that felt like a unique and exciting place. Since the Port Charlotte Town Center mall has become the county's retail center, the site's location next to the mall makes it a logical place for the county's civic center. This civic center should include festive gather-

ing or resting places—like a central plaza, an outdoor green, and/or a prominent water feature—that could provide venues for art festivals, evening concerts, and/or children's shows.

**Locate Visitor Uses on the Northern Side.** To capitalize on the traffic entering the county from I-75 and U.S. 41, visitor uses should be located on the northern side of the site. Increasing tourism will attract dollars from elsewhere and help broaden the tax base. These uses should include retail and entertainment venues, particularly "destination" retail.

**Locate Community Uses on the Southern Side.** To take advantage of the visibility and accessibility provided by Route 776 and Collingswood Boulevard from the west and south, community-oriented uses should be located on the southern portion of the site. This location would make it convenient for residents of neighboring Edgewater, El Jobean, and Edgewood to use these facilities, which could include a post office, a library, a community center, and so forth.

**Locate Business and Flex Uses on the Eastern Side.** The area on the eastern side of the site, toward the Murdock industrial area across the canal,



Proposed uses for the property. The center of the site should be reserved for a ceremonial, mixed-use town center, while the periphery should be reserved for more traditional commercial uses.

should be designated for flexible spaces that could have a variety of uses and could act as an incubator for new commercial businesses. A market currently appears to exist for this type of space. The eastern side of the property is appropriate for these uses, as it is adjacent to similar uses and is separated from the rest of the site.

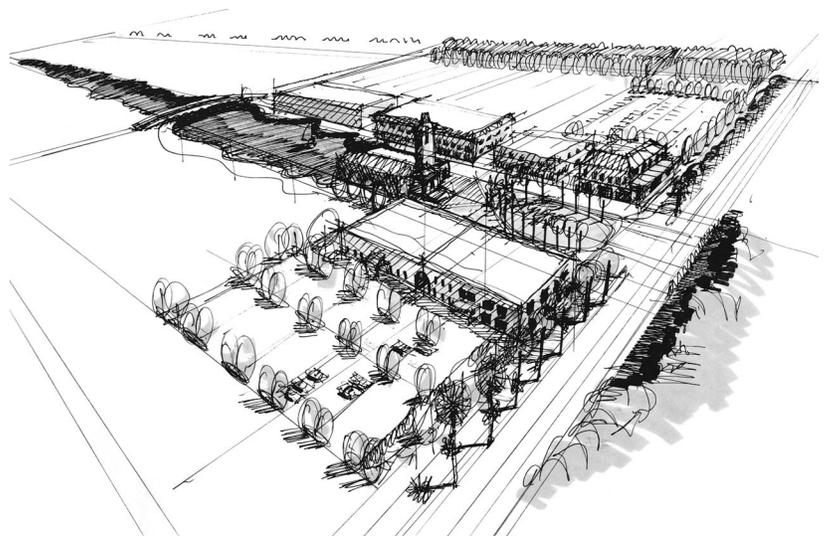
### Develop a Detailed Master Plan

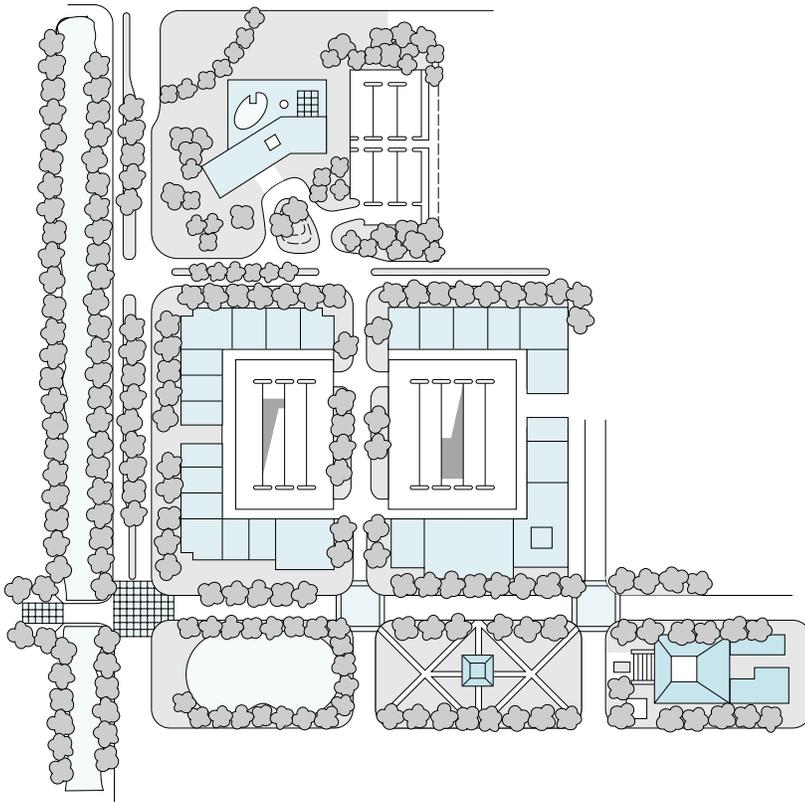
After it creates the conceptual master plan, the county should produce a detailed master plan. While the conceptual master plan should delineate “bubbles” of general uses, the detailed master plan should indicate and describe proposed land uses, parcel configurations, fundamental circulation elements, infrastructure needs, and the location of amenities. The detailed master plan should:

**Create a Retail and Amenity Promenade Along the Main Spine Road.** To fill an existing void in the county for both residents and visitors, a critical mass of retail and entertainment uses should be located along the spine road at the northern entrance to the property. This area would be a destination for fun shopping and eating activities, not errands or chores—a place where people could

stroll along with children eating ice cream cones, pick out fresh fruit from a farmer’s market, meander through an arts festival in search of a special gift, or dine al fresco as a band plays a classic tune. The quality of the amenities and the sense of community and excitement should be similar to those found at the central green in Seaside, the town center in Celebration, or Third Avenue in Naples.

An aerial perspective of the ceremonial entrance to the proposed development.





Parking should be located behind structures, with buildings fronting on the street to create a main street feel and promote pedestrian activity.

**Enhance the Accessibility and Connectedness of Existing Site Features.** Access to, from, and within the property should be improved. The detailed master plan should illustrate connections among existing and future sidewalks, walking paths, and bike trails that result in a linked system. Creating and maintaining this pedestrian-friendly system will be crucial to the development's success. Access into and out of the property also should be considered carefully, and the master plan should delineate clear connections from sidewalks, trails, and open spaces to nearby schools, community parks, and regional open spaces. Roads, sidewalks, curbs, and gutters will help shape or frame the individual development parcels and organize the site at the pedestrian scale. The master plan also should address other transportation issues, including current intersection capacities, trip generation, future intersection capacities, and the potential for additional road extensions and improvements.

**Develop Clear and Consistent Design Guidelines.** Design guidelines prepared in conjunction with developers and the community are an effective tool for establishing a distinct identity and sense of place for a project. Most importantly, guidelines set standards and expectations for a consistent and high level of quality at a minimal cost. The precedent set by a project built with design guidelines will provide a clear and positive influence for future development.

Design guidelines provide direction for the following elements:

- Design style, including architectural treatment and building materials;
- Building uses and open spaces, including placement, setbacks, and build-to lines;
- Structure size, including maximum mass and height dimensions;
- Signage; and
- Landscape and streetscape treatments, including amenities, plantings, and outdoor furniture.

The design guidelines for this project should call for the use of traditional Florida architectural references. Signage guidelines should ensure modest, tasteful, and coordinated signage that still allows for the presentation of corporate identities. The size and number of signs should be regulated to avoid chaotic clutter and visual overload. Directional and safety signs should be consistent and highly visible without being obtrusive.

The typical commercial development project lacks a coherent organizational pattern. Such a project often contains several buildings designed in a variety of styles, including metal structures, with incompatible uses and inconsistent setbacks. Projects with a clear, consistent set of design guidelines, on the other hand, are initially more attractive and maintain their level of quality longer than individually built projects. They also are more successful. They lease and sell faster—at higher prices—and retain their value better than projects that are not as coordinated or consistent. Such a high-quality project would represent a new type of development for Charlotte County.

**Create a Sense of Place.** The mix of pedestrian-oriented retail, entertainment, civic, and community uses and the interconnected system of roads, sidewalks, and trails recommended by the panel will create a sense of place heretofore missing in Charlotte County. This development should be a place that people visit because they want to be there, not merely a place they go to run errands. Although it should be a place for fun, not for chores, it will save residents time, since they no longer

will have to drive to Sarasota, Fort Myers, or Naples for special shopping.

The project should become the heart of the community—the central gathering place and focal point that the original land developer left out. While wealthier master-planned communities typically incorporate attractive amenities and community facilities into their original plans, this project will help create an important quality-of-life element for all county residents. In addition, the project will create a “postcard view” or icon for Charlotte County that conveys the heritage of old Florida.

### Make Crucial On-Site Infrastructure Improvements

In coordination with its creation of the conceptual master plan and the detailed master plan, the county should make specific infrastructure improvements to the property prior to development. The term “infrastructure” is defined broadly to include conventional utilities (water, sewer, and electricity) as well as roads, sidewalks, street lighting, and other physical improvements. Methods for funding these improvements are discussed later in this report. Physical improvements that prepare a site for construction, including utilities, roads, and other amenities, have been proven to help stimulate and guide development in many parts of Florida.

Although infrastructure components do not produce income, they do attract and enable the development of income-producing uses, such as retail space, office buildings, or hotels. Ideally, substantial infrastructure should be installed at one time to minimize disruption and create cost efficiencies. The panel recommends the following timing for infrastructure improvements:

#### Install Utilities, Roads, and Circulation Features

**Prior to Development.** The county should provide main utility connectors on the perimeter of the site—with stems extending a short distance into it—thus allowing for flexible future connections and minimizing costs. In addition to the 12- and 16-inch force mains located adjacent to the site, the local power grid and communications network should be extended to the site. All utilities should



Top and middle: Downtown Punta Gorda has created a sense of place through interesting architecture, pedestrian-oriented buildings, brick sidewalks, street furniture, and landscaping.



Existing commercial uses in Charlotte County consist mostly of retail strip development and low-quality, visually unappealing light industrial uses.

## Lessons for Elsewhere

Many of the concepts and ideas that the panel developed for this property also are applicable to other parts of the county. The panel has identified the following ten “lessons learned” about issues ranging from policy decisions to land development to the provision of services:

1. Raise expectations of quality;
2. Provide transitions between adjacent uses;
3. Use utilities and infrastructure to stimulate, guide, and manage growth;
4. Organize development in clusters and nodes rather than strip corridors;
5. Promote high-quality development and aesthetics, especially at gateway locations;
6. Use amenities, open space, and water features to add value;
7. Convert liabilities to assets by removing development hurdles;
8. Balance development areas with conservation areas;
9. Transfer density and development rights to appropriate locations; and
10. Establish distinct areas separated by greenbelts, which beautify the community and help define these spaces while also providing shade and improved air flow.

Clustered development reduces sprawl and vehicular congestion, allows utilities and infrastructure to be shared, reduces costs, and helps preserve the natural landscape. In addition, water features increase the enjoyment of the site.

be buried underground to enhance the site’s aesthetic appeal.

The property’s roadway and circulation network should be enhanced with a special streetscape treatment that includes benches, shade trees, palm trees, lights, and flower beds. The county should consider using special paving materials like tile, terrazzo, or brick, which are much more attractive than concrete.

**Install Public Amenities as the Project Is Built.** Fundamental open-space elements and public amenities—fountains, plazas, and other places that support civic and public activities—should

be constructed as the project is built. The promenade landscape should be well lit and attractively landscaped, incorporating appropriate and tasteful entry signage to create a strong statement about the quality of the development. The foundation for these amenities, however, should be constructed during the site preparation phase. Ultimately, storm drainage and irrigation facilities will be integral to the landscaping and site amenities. Fountains with forced-air jets and bubblers will help aerate the water and protect its vitality.

# Development Strategy

The preceding section outlines an ambitious plan for the study site that offers both a vision of the area as an exciting community destination and a strategic prototype for addressing Charlotte County's platted lands challenge. The panel's recommendations would put into immediate action the priorities of the 2001 Charlotte Assembly to "address the county's platted lands problem, attract new businesses, and make growth pay its own way;" "use vacant lots to create new development patterns;" and "devise neighborhood design plans that would address current and future wants and needs."

The county should play a fundamental and critical role in conceiving, developing, and implementing the project to be built on the study site. The panel proposes that Charlotte County government assemble the individual parcels on the site into a contiguous property, replace inadequate or non-existent infrastructure with modern amenities to attract high-quality investment, and prepare a master plan to transform the property into a community destination—a town center—that incorporates a mix of civic, commercial, and residential uses. The county has several options about how it can ensure that the project is financed and constructed in a manner that will provide Charlotte County with a return on its investment that is consistent with its participation in the project.

The panel believes that the county must embrace the active, positive role described here in the various steps to develop the town center. By doing so, the county will help ensure that the project addresses the public's broad set of concerns, in ways that the market, acting alone, might not.

The site represents an important opportunity for Charlotte County and deserves the best planning and development that the community can bring to it. At a critical time in the county's development, this is a chance to bring high-quality development

not just to those with sufficient resources to buy it, but to everyone in the community.

Transforming the site from a grossly underutilized opportunity for future sprawl with little economic development contribution into a vibrant community hub will take significant planning and organization. The panel proposes a three-phase development strategy: predevelopment, land assembly, and site development. While the following descriptions of each of these phases include cost estimates, the "Implementation" section details funding mechanisms that can make this plan a reality, the county's financial return on its investment in the site, and community outreach activities to maximize civic involvement in and awareness of the proposed plan.



Panelists discuss details of the panel's proposed development strategy.



Panelist Nathan Watson (at left) speaks with Charlotte County residents.

## Phase I: Predevelopment

The panel believes the county should move expeditiously on the following recommendations, as delay likely will increase predevelopment costs. The panel believes the county can complete these predevelopment activities in six to nine months, at an estimated cost of \$225,000 to \$300,000. It is crucial to note that a delay or less-than-rigorous county commitment during this phase likely would increase land acquisition costs significantly, as owner expectations escalate and speculator interest grows.

### Enact a Temporary Development Moratorium and Interim Guidelines

The panel strongly recommends that the county promote an efficient, affordable, and fair development process by adopting a temporary moratorium or interim development guidelines during the predevelopment phase. In the absence of such regulatory limits, owners of vacant parcels within the study area or people considering new purchases of residential lots there could make significant investments without knowing that the county has plans for the area that might conflict with their plans. Just as importantly, the county's cost to acquire property and relocate residents would increase significantly without a moratorium or interim development guidelines.

### Dedicate, Hire, or Contract Adequate Staff

Implementing this project will require people with a broad range of professional skills, including legal services, GIS mapping and database management, land use planning, architecture, engineering, and market research and analysis. These services can be provided by existing county staff, by new employees hired specifically to implement this program, and/or by outside consultants working at the direction of county staff. One of the county's first tasks during the predevelopment phase should be to assess its internal staff resources and assemble a complete professional team by hiring additional in-house or consulting staff as needed to implement the development proposal.

### Gather and Analyze All Pertinent Data

Decisions about the site must be data driven, and data collection and analysis will be core activities during the predevelopment phase. The county's

existing database already contains extensive information on each parcel within the study area, including its current ownership status, tax delinquency status, the status of any historic deed restrictions, and the assessed value of the property and any structures on it. Information that must be collected during this phase includes an inventory of physical features, a traffic impact study, legal research, and an infrastructure analysis.

### Adopt All Necessary Enabling Legislation

In addition to enacting a development moratorium, the county may need to adopt legislation to create a community reinvestment area (CRA), amend the existing land plan, and amend the property's zoning classification.

### Investigate and Adopt Additional Development Incentives

The panel believes that genuine incentives for revenue-producing development at this site are the core of its recommendations. These incentives include:

- The county's assembly of land and/or the commitment to use its powers as an acquisitions agent;
- The dedication of infrastructure improvement funds—from Charlotte County Utilities (CCU) funding, tax increment financing through a newly established CRA, and/or part of the one-cent sales tax—and the prioritization of road construction projects for the area;
- The establishment of a relevant, cohesive master plan for development; and
- The location and/or connection of community facilities as anchors or amenities within the study area.

In addition, the county should consider the use of other incentives, such as impact fee adjustments, "rights (TDRs) to stimulate the development of this property.

### Establish Review Procedures

The panel recommends that the county ensure its ability to exercise discretionary review of proposals for the development of individual sites within the property. If the county's existing regulatory

## Redevelopment Time Line



structure (for example, the “PD” zoning designation) does not permit this, the county should establish such a review procedure.

### Establish an Enforcement Mechanism

The county should put in place effective mechanisms for enforcing the design guidelines and property management requirements established by county code, as well as project-specific requirements. In this way, the county will help to ensure that the high-quality development represented by the town center project will be maintained into the future. If the county’s existing regulations do not provide a clear mechanism for the enforcement of design guidelines and responsible property management, then the county should establish such a process for this site.

### Locate Civic Uses On the Site

The county should consider locating one or more civic uses within the town center. A public library would be an excellent candidate for this site. The panel understands there is currently a proposal to establish a new main library in Port Charlotte. The panel believes that siting this important, widely and well-used community resource at the town center would provide a variety of benefits.

A library on this central and highly visible site would strengthen the community’s identity. It would function as a community meeting place, bringing different generations together—during the day and into the evening—at a hub of the community. It could be accessed easily from the county’s roadway system and via any public transportation system that may develop in the

future, and would be within easy walking distance of many complementary uses, including restaurants and cafés, shops, and strolling and people-watching venues. It also should be noted that state and federal funding opportunities are available to communities for library construction.

Other civic uses—such as a senior center, a community center, a post office, a performing arts theater, a sheriff’s substation, a transportation hub, or a visual arts center—would offer similar benefits, and should be considered for locations within the town center.

## Phase II: Land Assembly

The kind of high-quality development desired by Charlotte County residents will require the assembly of large parcels of land. The panel specifically recommends that the county acquire the 13 existing homes located within the study area at fair market values and relocate the residents prior to the physical development of the property. This multifaceted acquisition phase will take two to three years and cost between \$2.4 million and \$3.5 million.

The steps required to assemble the land are outlined below. The county attorney obviously will need to clarify or confirm any legal observations or recommendations outlined here.

### Encourage Land Donations

More than 200 property owners already have donated their land outright to Charlotte County. The county should undertake an even more exten-

sive public information program to advise owners of vacant parcels within the study area about the county's land donation program and inform them of the fact that—absent a revised land use plan for the project site—they will become subject to a \$10,000 assessment for sewer and water connections, beginning in 2006.

### Consider Land Exchanges

The county presently owns approximately 1,000 parcels. It should inventory its holdings to determine which properties it would be willing to exchange for lots in the study area.

### Acquire Tax-Delinquent Properties

Several lots in the study area currently are in default with regard to the associated property taxes. After it has made adequate requests for payment, the county should acquire the properties that remain delinquent.

### Purchase Properties

Market forces alone cannot overcome the site's challenges, and the county will have to step forward and take the lead in consolidating the hundreds of underutilized private lots in the study area into a contiguous, meaningful development site. The county should pay fair market value to acquire the necessary homes. As a last resort, it should use its powers of eminent domain.

### Eliminate Deed Restrictions

Another issue that likely will be laid to rest by the county's acquisition of the site relates to the potential effects of deed restrictions. Most of the quarter-acre lots in the study area originally were subject to deed restrictions—imposed in 1959 or 1960—that limit the lots' future use to residential ones. For a variety of reasons, these original deed restrictions do not appear to present insurmountable obstacles to developing the site for nonresidential uses, even if the county does not acquire the land.

For example, the panel has been advised that these deed restrictions generally expire 30 years from their creation. If a parcel is conveyed during that 30-year period, the deed restriction survives the conveyance only if it is expressly and specifically included in the transfer. Thus, the deed restriction ceases to exist if the lot was not con-

veyed within 30 years or if it was conveyed but the deed restriction was not specifically included in the conveyance.

For lots whose deed restrictions have not already been removed as described above, the doctrine of "changed circumstances" may void the deed restriction. For instance, development in the vicinity of a property or improvement of the roadway system—both of which are evident at the site—may be enough to establish changed circumstances for this purpose. Additional provisions for amending deed restrictions also may apply to the site.

Any of the scenarios described above may extinguish the "residential only" deed restrictions that originally were attached to the lots on the site. Each, however, likely will be attended by an administrative, and perhaps a legal, challenge. Determining the status of each lot would be a sizable administrative task. The demands of defending a legal challenge speak for themselves.

A simpler solution would be for the county to acquire the site. The panel has been informed that deed restrictions disappear automatically when the county acquires property. This would remove the need to determine the status of any deed restrictions. Another benefit of the county's acquiring the site is that it removes concerns—well founded or not—about regulatory takings claims under the U.S. or Florida constitution, or claims that might be brought under the Bert Harris Private Property Protection Act.

## Phase III: Site Development

Site development will consist of three major components: the creation of an overall master plan, the establishment of the county's role in the development process, and the provision of necessary infrastructure.

### Enact a Master Plan

The previous section outlines the goals and details of both the conceptual and detailed master plans for this site. This section deals with a strategy for the creation of an overall master plan.

The master plan creation phase should coincide with the land assembly phase. The master plan also should include a time line establishing milestones for land sales and construction, to provide a reliable schedule for the generation of revenues that will repay the county's investment in the property. While the ultimate developer may refine this document to meet market conditions, the master plan should provide a reliable description of the property's development future to investors, property owners, and residents alike.

The master plan development process should be open to the public but controlled by the county, which ultimately will be responsible for its implementation. This process will take three to six months and will require outsourcing for consultant services.

#### Determine the County's Role

Once Charlotte County has articulated a clear vision of what kind and quality of development it is looking for within the study area, its next step will be to consider how the project will be financed, marketed, and constructed. The county must consider three basic alternatives, which vary in the amount of risk and control the county will have.

**The County Acts as Master Developer.** Under this approach, the county would own the property until it sells individual sites to builders or developers. Those sales would impose restrictions on the purchasers, based on the master plan and other county regulations. While this scenario allows the county to maintain the greatest level of control, it also leaves it more vulnerable to market shifts and development risks than would the following two alternatives. Moreover, the county's administrative structure is comparatively protracted, compared with that of a private development firm. If undertaken entirely by the county, the project may be inflexible and could lose its competitive edge as an attractive site for high-quality, market-driven development.

**The County Sells the Site to a Master Developer.** In this approach, the county would sell the site outright to a private developer. This master developer then would develop the property (possibly by selling some parcels to other builders or develop-

ers), subject to the master plan and other regulations. This approach would give the county less control than the previous one.

A variation of this scenario would involve the county issuing a request for proposals (RFP) or request for qualifications (RFQ) to select a private developer that would work with the county to complete the land assembly process, coordinate infrastructure development, and complete the master plan. Before issuing the RFP/RFQ, the county would determine the specific incentives it is prepared to offer and the powers it would dedicate to the development effort to produce the desired economic growth engine for the county.

The selected master developer would enter into a contract with the county to meet certain development criteria, with specific performance requirements to ensure compliance. The county CRA and the master developer would agree on a schedule of land sales and development whereby the county would be repaid for assembling the land and would begin to receive additional tax revenues in order to repay any infrastructure bonds used for the project. This outsourcing method often is used when a government entity's in-house resources already are being fully utilized and/or the government wants to shift development risks to the private sector.

**The County Coventures with a Developer.** A third alternative builds upon the RFP/RFQ process described above and also may be attractive to the county. This method would allow the county to participate directly in the benefits and risks associated with the project. By contributing its assembled land and possibly other resources, the county could become an equity partner in the project. The key elements of the RFP/RFQ process for the county to consider here would be the quality of the developer and its proposed profit-sharing and risk-taking scenario. This alternative offers the potential for higher returns to the county, but—as with most investments—the higher the potential return, the greater the inherent risk.

Each of these alternatives has been employed in many communities across the United States, including the city of Punta Gorda and Charlotte County. While lessons should be learned from

Providing the necessary infrastructure adds value to the land and reduces the developer's risk.



experiences in the immediate area, the panel would like to stress that these methods already have had some measure of success in increasing the tax base in their communities. There also are many examples of the successful application of these techniques in other communities, and Charlotte County would be well served to identify and emulate these successful models. This phase, which will begin with the RFP/RFQ or parcel sale process, will take ten to 15 years for full buildout.

#### **Develop Necessary Site Infrastructure**

The county will have to develop the basic infrastructure needed to serve the site in an efficient,

integrated manner. Infrastructure includes not only conventional utilities (such as water, sewers, electricity, gas, and telephones), but also the fundamental site preparation necessary to attract revenue-producing uses such as hotels, retail space, offices, and so forth. Physical site preparation includes installing roads, sidewalks, curbs, gutters, storm drainage systems, landscaping and irrigation, lighting, signage, and basic community amenities such as bicycle or walking paths, plazas, and parks.

The panel estimates that this infrastructure would be provided over a period of three to five years, at an approximate cost of \$6.9 million. While this is a significant investment, these infrastructure improvements will prepare the property for vertical development and significantly increase the sales value of the parcels.

# Implementation

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**T**he development proposal outlined in the previous sections is ambitious and will create a new town center in the heart of Charlotte County, providing a sorely needed “sense of place” for the county. This section outlines funding options that the county can use to pay for the proposed development. It also describes how the county can reap a return on its investment in the project, as well as the community outreach efforts it should undertake to involve citizens in the process and help ensure its success.

## Options for Funding Development Costs

In order to undertake necessary predevelopment, land assembly, and site development activities, the panel believes Charlotte County will need approximately \$9 million to \$11 million over a five- to seven-year period. Later in this section, the panel demonstrates how this investment not only will be recouped, but will represent a continuing source of revenue far in excess of the original investment.

Some of these funds already have been allocated for various uses in the study area; other monies will need to come from multiple sources. The panel recommends the following options as sources of funding for the required site development costs.

### Renew the One-Cent Sales Tax

If county voters renew the one-cent sales tax, the panel recommends that the county commit a portion of these tax proceeds to fund its costs for the town center project. This mechanism would provide an immediate and stable source of revenue without involving the time or costs associated with issuing bonds. The panel projects that the county will need to commit approximately \$5 million from this source toward the development of the study area property.

### Use Funds Already Dedicated for Infrastructure Improvements

Charlotte County Utilities (CCU) already is scheduled to access dedicated state funds in 2006 for the installation of county water and sewer services in the study area. These funds should remain dedicated to this area.

Service upgrades beyond those presently planned will be required. The cost of these upgrades, however, will be offset by the plan to install only the primary sewer and water infrastructure on major roadways—as indicated in the planning and design section of this report—with tie-ins available for future development.

CCU will need to study the issue further to ensure that the initial infrastructure will adequately accommodate the anticipated development. The cost of these utilities is estimated to be \$500,000 to \$600,000 and may be amortized over 20 years.

### Use Charlotte County Transportation Trust Fund Monies

The Charlotte County Transportation Trust Fund already has allocated approximately \$1 million to \$2 million for the expansion of Toledo Blade Boulevard. While the panel believes this is an appropriate budget, these improvements need to be put in place early in the development cycle to enable and promote the successful development of the study area site.

### Consider Establishing a TIF District

Depending upon the level of funding—if any—available from the one-cent sales tax, the county also should consider establishing a community reinvestment area (CRA) or tax increment financing (TIF) district. Tax increment financing and/or similar revenue anticipation bonds typically are used in public/private ventures, and would allow the county to issue low-cost bonds today that will be repaid in the future from revenue generated by

Panel chair Maureen McAvey speaks with Charlotte County government representatives.



the developed project. The funds can be used to pay for predevelopment costs, land acquisition, master planning, and infrastructure development.

The projected increment for the development will begin concurrent with the change in the property's use. Even assuming a very modest change in value associated only with the up-zoning, tax proceeds from the study area will increase prior to any development.

While the county acquires and holds the land—taking the existing taxpaying properties off the tax rolls—it will experience a corresponding reduction in tax revenues. This temporary reduction, however, will be offset by the future increased tax base, as value is created through up-zoning, infrastructure improvements, and the replacement of residential uses with commercial ones.

The completed development will produce a tax increment in excess of \$2.3 million annually. Phased over ten to 15 years, the net present value to the county will be in excess of \$12.5 million, with the absolute value in excess of \$23 million in today's dollars. This increment will afford the county with more than enough revenue to pay off the bonds for infrastructure development and/or acquisition.

Should additional funding beyond the one-cent sales tax program be necessary, TIF mechanisms represent the most logical and perhaps the most effective method of generating economic development incentives for this property. For additional information on the experience of other communities with TIFs, see ULI's *Tax Increment Financing* InfoPacket.

### Explore Other Sources of Funding

Additional potential sources of revenue include special-purpose funds that may also apply to the subject site. Funding for roads and circulation systems may be available through Transportation Equity Act for the 21st Century (TEA-21) federal transportation enhancement funds related to mass transit, rails to trails funds, and so forth.

Environmental protection grants may be available for stormwater and drainage infrastructure. Siting civic and community-oriented uses such as a public library within the site is particularly attractive because—in addition to their value as amenities and incentives for other investment—state and federal funds are available for those uses and accompanying infrastructure.

### The Return on the County's Investment

The panel believes Charlotte County must commit \$9 million to \$11 million in new or already allocated funds from multiple sources to fulfill the vision for the study area. The county can anticipate an extremely strong return on its investment through new tax revenues, land sales, and the benefits of additional economic development created by this project.

### New Tax Revenues

The present assessed value of the properties within the study area is approximately \$6 million. These properties generate annual property tax revenues of less than \$100,000 per year. If the study area property remains in its current underdeveloped state, the county could anticipate a total of only \$1.5 million in property tax revenues over the next 15 years.

When completed, the town center project proposed by the panel can be expected to increase the county's tax base by \$160 million. Assuming gradual buildout of the area, the county would receive \$23 million in property tax revenues from the project over the next 15 years. The completed development is expected to produce a tax increment in excess of \$2.3 million annually. Phased over ten to 15 years, the net present value to the county would be in excess of \$12.5 million, with the absolute value in excess of \$23 million.

## Town Center Preliminary Development Pro Forma

### Predevelopment

#### Predevelopment Costs

Legal, title, planning, design, engineering, data collection, and analysis \$100,000–\$125,000

Other development costs: financing, financing legal, public relations, etc. 125,000–175,000

**Total Predevelopment Costs \$225,000–\$300,000**

#### Land Acquisition Costs

Staffing for two–three years \$285,000

Property acquisition \$2,000,000–\$3,000,000

Legal \$110,000–\$200,000

**Total Land Acquisition Costs \$2,395,000–\$3,485,000**

#### RFP/RFQ Costs

Preparation, advertising, and review \$100,000

**Total RFP/RFQ Costs \$100,000**

#### Infrastructure Costs

Utilities for major streets \$600,000

Drainage \$150,000

Streets and streetscape

Toledo Blade Boulevard (4,000 linear feet at \$500 per linear foot) \$2,000,000

Main Street (3,000 linear feet at \$400 per linear foot) \$1,200,000

Main Loop (5,800 linear feet at \$500 per linear foot) \$2,900,000

**Total Infrastructure Costs \$6,850,000**

**Total Development Costs \$9,570,000–\$10,735,000**

#### Sources of Funding

Tax increment basis (excess over existing assessment) \$23,544,000

Charlotte County one-cent sales tax dedicated funding \$4,920,000

Charlotte County Transportation Trust Fund \$2,000,000

TEA-21 \$100,000

Charlotte County Utilities \$600,000

Land sales \$11,600,000

**Total Sources of Funding \$42,764,000**

**Excess of Sources over Uses \$32,029,000–\$33,194,000**

### Profits from Land Sales

The county will recoup the cost of land acquisition immediately, through land resales to developers at premium prices. The county's role as acquisitions clearinghouse offers substantial value to developers, since it will be able to assemble large key development parcels that otherwise would not be available. The county will recapture these enhanced values as it sells the parcels to private developers. The panel conservatively estimates that the county will make more than \$10 million from land sales over 15 years as a result of the increased value of larger contiguous parcels zoned for commercial development with access to infrastructure.

### Additional Economic Stimulus

The county also will benefit from indirect economic stimulation created by development of the study area site. When the town center project is completed it will employ more than 1,000 people, making it one of Charlotte County's major employment areas and adding new payroll revenues to the county economy.

Offering easy access and top-quality amenities, the design concept anticipates high-end retail space, professional offices, a hotel, and other uses that will attract higher-paying jobs than currently are found in the area. The development concept also has been targeted to attract and retain retail and entertainment dollars that presently are spent outside the county, and to stimulate the county's tourist economy. The master plan anticipates the potential for a hotel and its resulting hotel tax revenue. Overall, the proposed project is seen as a principle source of economic development, employment generation, and tax base growth in western Charlotte County.

### Community Outreach

Community outreach will be an important component of the site's development. Citizen involvement will be crucial, not only to ensure that development on the site directly responds to residents' civic vision for the community, but also to avoid the delays and/or added costs associated with community conflict, litigation, or citizen-based ballot action. The strategies and processes associated

with this project can be used to address the platted lands challenge throughout the county, and involving residents in this first initiative will enhance citizen familiarity with and investment in this land use approach.

There are at least four separate audiences for public information and outreach activities. Charlotte County taxpayers who live outside the study area make up the largest group of affected stakeholders. These citizens clearly will be interested in how the development proposal for the study area will affect the quality of their lives and their own financial situations, how it will affect the county, and how this initiative might serve as a model for addressing the platted lands challenge elsewhere in the community.

With economic investment in Charlotte County a top concern, a second and distinct target audience for outreach purposes consists of people who invest significantly in the community: developers, real estate agents, bankers, major business owners, construction professionals, and so forth. The support of these investment professionals for this development proposal and its long-term possibilities is critical if Charlotte County is to retain existing levels of nonresidential investment and attract additional investment in the future.

Two separate groups of "parties at interest" who own property within the study area merit targeted outreach to ensure their informed and fair involvement in this process. The few homeowners currently living within the boundaries of the study area clearly have intense and highly personal concerns that need to be addressed on an individual basis. Property owners living outside the study area but within Charlotte County generally can be reached through conventional outreach techniques, while communication with property owners living outside the county or even outside the state may require direct mail or phone banks.

Community outreach must involve both significant public participation activities and public information efforts. Public participation activities are aimed at involving citizens in the decision-making process so their input can be meaningfully incorporated into the final master plan. These

activities include individual meetings with homeowners, public workshops with residents and taxpayers living outside the study area, and presentations to investor- and business-based groups such as the chamber of commerce, the board of realtors, and Enterprise Charlotte.

The Charlotte County Citizens' Academy and the Charlotte County Citizens Advisory Committee for Sales Tax Projects also provide unique forums for advisory input from highly informed citizens. Topics for which citizen input is particularly important include community amenities and civic uses, the desired phasing of project construction, and the role of the community in the future consideration of the county's platted lands situation.

Public information activities should be directed toward avoiding any controversy or opposition that might arise from misperceptions or lack of information. One of the most important public education tasks will be to help citizens appreciate that the county cannot afford to allow the platted lands situation to continue unaddressed.

In the words of the Charlotte Assembly 1998 Steering Committee, residents need to understand that

these lots, if fully developed, would lead to a population of more than 750,000 people spread across 215 square miles. The cost of providing infrastructure is estimated to be in the billions. If Charlotte's growth remains concentrated in the low end of the residential market, current and future county residents will end up paying the cost of growth one way or another. Either taxes will have to be raised or the price will be paid in a degraded quality of life.

In particular, people who own property within the study area must be informed that their properties currently are scheduled for major infrastructure assessments in 2006 and advised of the availability of the county's land donation, exchange, and acquisition programs.

In addition to addressing why allowing the current situation to continue is undesirable, the county will need to take affirmative steps to avoid public misperceptions about the development proposal itself ("I hear you're putting in a huge industrial

park!"), about its potential impacts ("This is going to cause our taxes to go up!"), or about the process and timing for the implementation of the master plan. Public information also will be important to educate citizens about the plan's anticipated benefits: increased property tax revenues, job generation, hotel tax revenues, the creation of a genuine community destination—a town center—and so forth.

The county has a variety of public information tools and vehicles available to ensure that citizens are fully informed about the development plan. Fact sheets can be distributed during community meetings and inserted with tax bills and newspapers for low-cost delivery to county taxpayers and residents. With the cooperation of major employers such as the Charlotte County Public Schools, St. Joseph's Hospital, and the Charlotte Regional Medical Center, public information materials can be distributed to workers at their job sites.

The most crucial employee outreach should focus on Charlotte County's own 1,600 workers. If left uninformed about this proposal and uninvolved in the outreach process, county workers inadvertently could become credible sources of misinformation. If they are briefed appropriately—through the *CCNews*—about the town center project and what it means for the community, however, these 1,600 individuals could serve as highly effective "ambassadors" for the county.

Press relations will be an important part of the county's outreach efforts. Conventional press releases and editorials can be augmented with press briefings and editorial boards to ensure that reporters are able to provide press coverage that is both insightful and accurate.

Given the increasing levels of computer literacy in the county and the county's commitment to promote civic involvement even among citizens with limited mobility, the panel strongly recommends the use of Web pages and interactive e-mail as productive tools for both public participation and public information.

## Conclusion

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**D**uring its stay in Charlotte County, the panel witnessed firsthand the difficulties created by the county's hundreds of thousands of platted lots. Panel members were impressed by the determination of the county commissioners, the planning staff, and other government officials to overcome these problems. The combination of an ever-growing population and the platted lots represents a huge challenge for the county. Rather than throwing up its hands and giving up, the county has shown leadership by actively seeking creative solutions to the problem.

The development proposal detailed herein can provide the county with a much-needed town center, create a "sense of place" in the county, and generate much-needed tax revenues through commercial property taxes, land sale profits, and the stimulating effect of the development on the local economy. To enact this proposal, the county must assemble significant tracts of land and construct significant public infrastructure.

Some people probably will say the county cannot extend itself in this way, that it cannot afford to make the site improvements prior to development, and that no market exists for the final product. To them, the panelists ask: What is the cost of continuing with the current method of land development in Charlotte County? Continued reliance on a low-value residential base and low-quality light industrial uses will not generate sufficient tax revenues to cover county expenditures, leading to a budget deficit, which likely would need to be addressed by an unpopular property tax increase.

The panel believes that the population growth demonstrated in the state, region, and county has created and will continue to create market demand for property in the region. Charlotte County must address the fact that the demand generally is not for what the county is offering. The county therefore must change what it is offering.

Charlotte County can create land value and property tax revenue by assembling lots and providing necessary infrastructure, thus removing two major obstacles to economic development there. In addition, by controlling the process the county can leverage these assets to meet other county goals.

The panel was impressed by the forward-looking nature of the elected officials in Charlotte County and by their determination to face the problems of platted lots and population growth head on and to seek solutions. County officials are wise to address this issue now, as the panel believes that the development pressure being felt in counties to the south of Charlotte County is on its way north.

The panel is optimistic that the county can meet its "platted lands challenge" with a "platted lands solution." The panel believes the recommendations in this report represent one solution.

# About the Panel

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## Maureen McAvey

*Panel Chair*

*Washington D.C.*

McAvey is senior resident fellow and ULI/Klingbeil Family Chair for urban development at the Urban Land Institute in Washington, D.C. The Institute is the premier research and education organization within the real estate and land use industry. She has more than 25 years of experience in real estate development, consulting, and the creation of public/private financial structures.

Before joining ULI, McAvey was director of business development for Federal Realty Investment Trust (FRIT), a New York Stock Exchange–traded owner and manager of retail and mixed-use developments. In that capacity, she assisted in the establishment of the public/private financial structure for a mixed-use retail/housing development in Arlington County, Virginia. She completed a similar public/private partnership with the city of San Antonio to further FRIT’s Houston Street mixed-use project, which made use of tax increment financing, urban development action grant funds, and an Economic Development Administration grant to assist in the funding of necessary public improvements.

McAvey previously served as director of development for the city of St. Louis, a cabinet-level position. In that capacity, she also was executive director of the St. Louis Development Corporation, leading seven development-related boards and commissions. Her major accomplishments in St. Louis included construction of a new neighborhood commercial center anchored by a 24-hour grocery store; a privately financed, \$1 million master plan for the revitalization of the downtown area; negotiation of development agreements to

secure a new 1,000-room convention headquarters hotel; and a neighborhood planning effort.

Before moving to St. Louis, McAvey led the real estate consulting practices in Boston for Deloitte & Touche and for Coopers & Lybrand. While with the “big six” firms, McAvey directed due diligence efforts for more than \$12 billion in securitization projects for major banking and financial institutions. Her clients included institutional developers, major corporations, utilities, and colleges and universities. Her consulting efforts ran the gamut of new financing, restructuring, troubled projects, strategic planning, and mergers and acquisitions.

As a private developer, McAvey directed the West Coast operations of a national development firm, where she served as project manager for the \$40 million rehabilitation of a national historic landmark hotel with office and retail components. She also directed the master-planning effort for a 70-acre, 1 million-square-foot university-related research park, including the architectural, legal, and organizational components of development.

McAvey holds two master’s degrees, one from the University of Minnesota and one from the Kennedy School of Government at Harvard University. She has done extensive course work at Harvard Business School in commercial lending, investment management, finance, and real estate development.

McAvey was a member of ULI’s board of trustees from 1995 until 2001 and for two years chaired the Institute’s Regionalism Forum, which explored issues of smart growth, multijurisdictional boundaries and planning efforts, and shared revenue/fiscal disparities alternatives. She led a ULI Advisory Services panel that was invited to Krakow, Poland, to help the city create an economic development plan and strategy.

## Alan Harwood

*Alexandria, Virginia*

Harwood is an award-winning urban and environmental planner with 20 years of experience in revitalizing economically distressed urban communities, planning real estate development, and conducting environmental impact analyses for complex land use projects. He is the planning studio leader for the Alexandria office of EDAW, Inc.

Harwood's experience in planning reflects a perspective that is balanced between private sector development interests and the public benefits of community building and environmental protection. His economic and environmental work has included commercial and mixed-use development, residential communities and affordable housing, sports facilities and attractions, and open-space and cultural resources. He has completed more than 100 planning projects for a range of clients, including federal agencies, local governments, and private sector organizations.

Harwood has won awards from the American Planning Association, the American Society of Consulting Planners, and the American Society of Landscape Architects. He also has been certified by the American Institute of Certified Planners and is a member of the honor society Lambda Alpha International.

EDAW and Harwood have helped contribute to the economic recovery of Washington, D.C., through the successful completion of dozens of projects in the District of Columbia, including the MCI Center, the Washington Convention Center, the Downtown Action Agenda, and the Memorials and Museums Master Plan. Harwood also has worked in urban areas as diverse as Los Angeles; Atlanta; Chester, Pennsylvania; East Chicago, Indiana; Fayetteville, North Carolina; and Louisville, Kentucky. He brings excellent planning instincts, a strategic approach, strong leadership, and a personal commitment to each project. Harwood's project responsibilities include client coordination, team leadership, product quality control, and public presentations. Prior to joining EDAW, he worked for a local planning agency, an engineering firm, and a commercial builder.

## Tom Jacobson

*Rohnert Park, California*

Jacobson is an associate professor of environmental studies and planning at Sonoma State University. He also is director of the Institute for Community Planning Assistance and coordinator of the Environmental Mediation Program at SSU.

Jacobson holds a master's degree in city planning from the University of California at Berkeley and is a graduate of Hastings College of Law. He was formerly an attorney with the land use group at McCutchen, Doyle, Brown & Enersen—where he represented both public agencies and developers—and an adjunct professor at the University of San Francisco School of Law.

His publications include *Exactions and Impact Fees in California* and *Land Use Initiatives and Referenda in California*, both published by Solano Press Books. He is a consultant to public agencies on a variety of land use planning and law matters.

## David Kenyon

*Tempe, Arizona*

With more than 20 years of landscape architecture practice experience, Kenyon has developed a special understanding of working on complex projects. He joined Design Workshop as principal in charge of the firm's Vail office in 1995 and is now the principal in charge of its Tempe location.

Prior to joining Design Workshop, Kenyon was manager of site development for the EuroDisney (now Disneyland Paris) real estate division in Paris, France. He understands the complexities and demands of sitting in the "client's seat." Kenyon is an innovative problem solver with an aptitude for design excellence, fiscal responsibility, and timely execution. His work has won a number of national and regional awards from the American Society of Landscape Architects, the American Planning Association, and the American Institute of Architects.

Kenyon also is an accomplished educator. He has taught design studios, freehand drawing, and professional practice courses at Texas A&M Univer-

sity, the Italart Study Abroad program in Florence, Italy, and the University of Colorado at Denver. He has lectured at a number of institutions and conferences and conducted seminars for both architecture and landscape architecture licensure examinations. Kenyon presently is an active participant in Arizona State University's landscape architecture and planning programs.

## Zane Segal

*Houston, Texas*

Segal is a developer, marketing consultant, and real estate broker with Zane Segal Projects, Inc. Specializing in residential, retail, urban, historic, hospitality, resort, and mixed-use properties, he has more than 24 years of experience in real estate venture management, development, construction, brokerage, and marketing for a range of property types, including custom homes, lofts, townhomes, low- and mid-rise condominiums, hotels, land, shopping centers, office buildings, and sports facilities.

Segal received a baccalaureate degree from the Massachusetts Institute of Technology and a master of fine arts degree from the University of Southern California, and has been enrolled in a non-degree, graduate-level program in architecture at the University of Houston. He currently serves as membership vice chair of the ULI/Houston Executive Committee and has served on two previous ULI Advisory Services panels.

Segal is the founding executive director of the Museum District Business Alliance and founding president of the Houston Association for Film & Television, and has been quoted often by the media as a spokesperson for real estate development, urban design, and the arts. His community activities include serving on the Regional Planning Committee of the Greater Houston Partnership, as a presenter on urban design for the Cultural Resources Focus Group of Imagine Houston, as membership drive leader for the Museum of Fine Arts, and as president of Sparacino Company Dancers. Segal is an avid traveler, photographer, writer, and runner.

## Debra Stein

*San Francisco, California*

Stein is president of GCA Strategies, Inc., a full-service public affairs firm specializing in controversial land use projects. GCA provides opinion research, community relations, government relations, and campaign services to clients such as Calistoga Ranch Resort, Sumitomo Construction Company, Chevron Land and Development Company, McDonald's Corporation, and the San Francisco Giants.

Stein is the author of *Winning Community Support for Land Use Projects* and *Making Community Meetings Work*, both published by the Urban Land Institute, as well as numerous articles for magazines such as *Land Development*, *Multifamily Executive*, and *Planning Commissioner*. She is a member of the Society of Professionals in Dispute Resolution, the International Association of Participation Professionals, the National Association of Home Builders, the Urban Land Institute, and the California Bar Association. She has a BA in political management from the University of California at Berkeley and a law degree from the University of San Francisco School of Law.

## Tom Fitzgerald Stone

*Dallas, Texas*

Stone, now president of the T.F. Stone Companies, began his real estate career in 1970, after a six-year tour on active duty in the U.S. Air Force. He served as a captain in the Regular Air Force, was twice named "Junior Officer of the Year" in the Pacific Air Force, and was nominated to be a White House fellow at the age of 26.

Following his military service, he formed a Dallas-based real estate company specializing in the leasing and management of office buildings. In three years, the company grew to be the largest of its type in the Dallas area. Stone has developed, for his own account, approximately \$450 million in income-producing properties.

Stone is a licensed real estate broker and has been an active participant for 30 years in the Dallas Board of Realtors, the Texas Association of Real-

tors, the National Association of Realtors, the Urban Land Institute, the Building Owners and Managers Association, the Apartment Builders Association, and the Institute of Real Estate Management. In 1986, he was recognized as “Man of the Year” by the city of Durham, North Carolina, for his business and civic contributions to the city. He has served on the Board of Advisory Directors for the University of Mississippi School of Business since 1995.

Stone received his undergraduate degree from the University of Mississippi and a master’s degree, cum laude, from the University of Southern California. He also studied law for two years at the law schools at St. Mary’s and St. Louis universities, and served as adjunct professor of management in the MBA program of the Braniff Graduate School of Management at the University of Dallas for ten years.

### **Nathan Watson**

*New Orleans, Louisiana*

Watson has been active in real estate development in New Orleans for more than ten years. His company, Watson Developments, focuses on bringing innovative solutions to both urban and suburban real estate development needs. His current proj-

ects include a 1,250-room convention hotel and a 118-acre new community development.

Prior to starting his own firm, Watson was responsible for the development and marketing of a 74-acre mixed-use project in downtown New Orleans. The master-planned urban development—a former rail yard—included more than 700 luxury apartments (now complete), an expansion of the convention center (complete) and 1,250 hotel rooms (now in the predevelopment phase). Watson also was responsible for the review of project development opportunities, including multifamily, office, hospitality, and storage uses.

Earlier in his career, Watson launched and served as president of FirsTrust Community Development Corporation, a for-profit developer that focused on urban infill multifamily housing through a variety of public/private financing sources. The company developed 200 residential units during Watson’s tenure.

Watson has been a member of the Urban Land Institute since 1995. He served on two previous ULI Advisory Service panels, which visited Victorian Square in Sparks, Nevada, and Oakcliff in Dallas, Texas.



