

East Naples Community Development Plan

April 2020

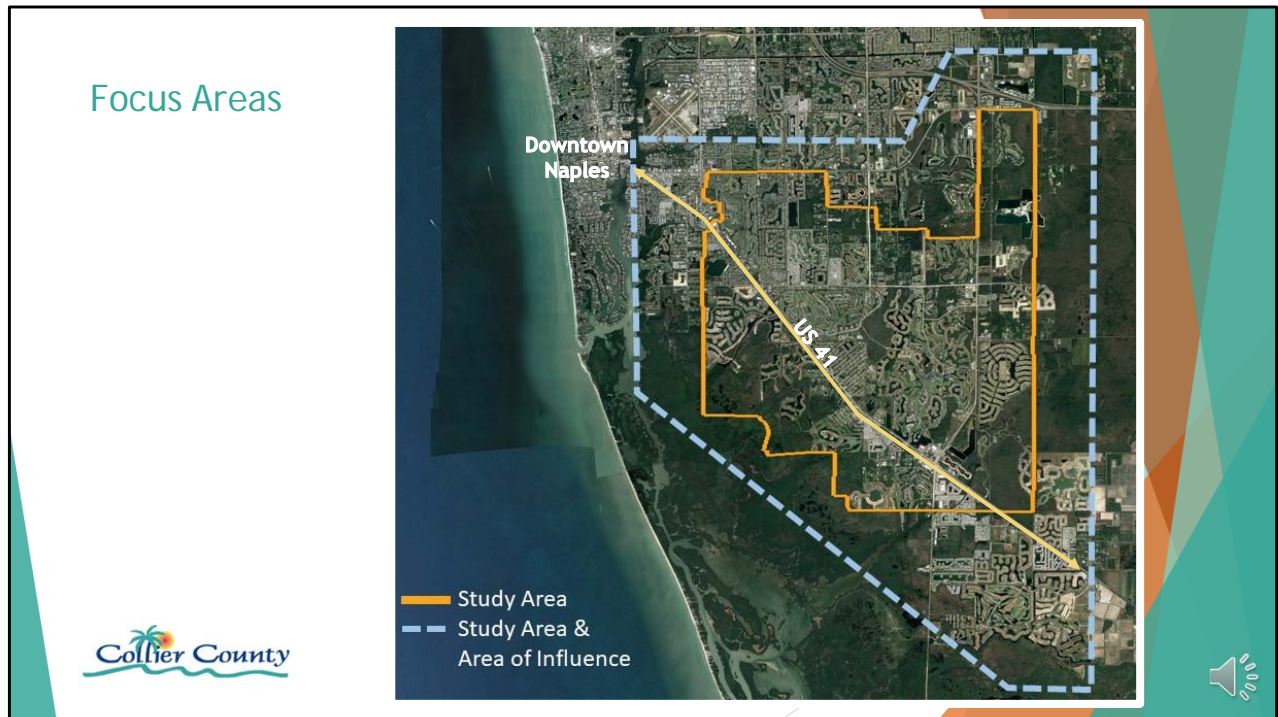


Welcome to the presentation on the East Naples Community Development Plan, which will help shape the future of East Naples. This presentation introduces the project and approach, reviews some preliminary findings, and provides ways you can get involved.



We'll start with the project overview.

Focus Areas



This planning effort expands on the area of focus from the US 41 Corridor Study completed in 2018, including nearby neighborhoods in East Naples. The study area for this project is used for running data and spatial analysis, but we'll also account for elements, such as major retail developments and roadway connections, of the surrounding area of influence.

Purpose of the Plan

- ▶ Establish community vision
- ▶ Guide Land Use & Development
 - ▶ Encourage desired uses, discourage undesired uses
 - ▶ Evaluate commercial development/redevelopment options
 - ▶ Create and build consensus on land use concepts
- ▶ Inventory assets and services
- ▶ Provide high-level transportation options for multiple methods (e.g., walking, biking)



The main purpose of this plan includes establishing a community vision and guiding future land uses and development in the Study Area. We will also provide an inventory of community assets and services, as well as evaluate ways to improve access and connectivity for different methods of transportation. We will document any other key themes that may emerge for consideration and future follow-up options

Tentative Schedule

Key Project Components	2020									
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Public Meeting					★					
Background & Needs Assessment		█								
Public Meeting							★			
Goals, Recommendations & Concepts						█				
Draft Final Development Plan								█		
Board of County Commissioners Approval Meeting										★



The first public meeting tentatively scheduled for May will review preliminary information provided in this presentation and offer an opportunity for live discussion and addressing questions. The follow-up public meeting later in the project will review and gather feedback on preliminary goals, recommendations, and concepts based on initial findings and public involvement. The Board of County Commission public approval meeting is an opportunity for information and comment on the finalized plan. Depending on guidance from staff and the County Commission, webinars may be considered for meetings to adhere to social distancing measures related to COVID-19.

Community Vision



A primary aim of this Plan is to gather input as a basis for a community vision, with a particular focus on land use and development since these were main topics identified in the initial 2018 US 41 Corridor Study.

Vision Approach

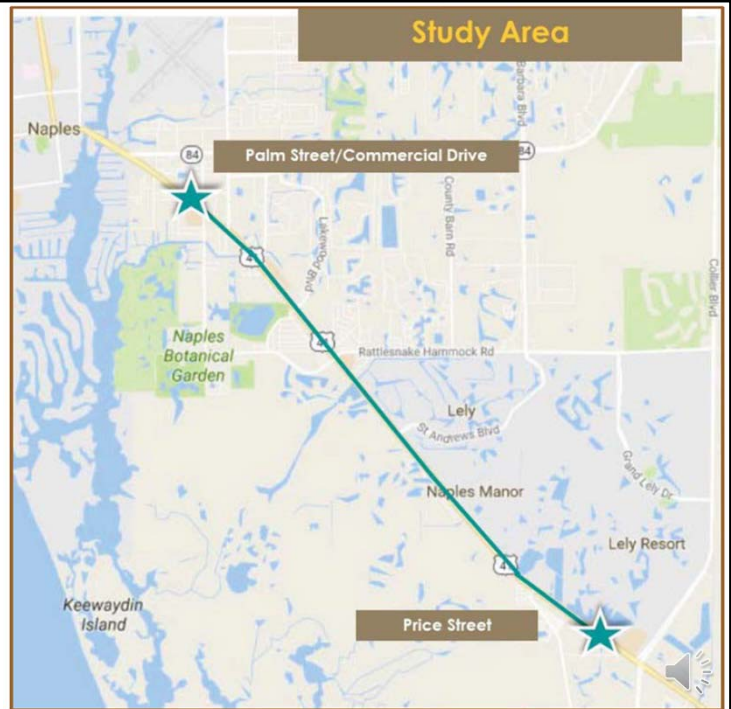
- ▶ Community engagement - a vision defined by you!
 - ▶ Background information for consideration
 - ▶ Input via survey and comments
 - ▶ Key Questions
 - ▶ What do you love about East Naples?
 - ▶ How do you describe this place and its future?
- ▶ Past input:
 - ▶ 2018 US 41 Corridor Study - vision for physical environment, desired uses/activities



The vision approach focuses heavily on community engagement as part of this planning effort, as well as community engagement outcomes of the 2018 Study. These efforts try to capture how the community would describe itself and its future, what aspects are most important, and a desirable vision for the future physical environment and uses of the area.

2018 US 41 Corridor Study

- ▶ Preferences for uses and development types, among other themes
- ▶ Public involvement:
 - ▶ 3 stakeholder meetings
 - ▶ 3 general public meetings
- ▶ Basis for land use/development vision, land use concepts in East Naples Community Development Plan



This slide shows the extent of the corridor on which the 2018 Study focused. The Study aimed to determine public preferences for future development types and uses in this area so that these preferences could be facilitated and incentivized through regulatory updates. Findings were based on input and polling results from three stakeholder meetings and three public meetings held as part of the study. The following slides highlight key land use and development preference takeaways from the Study based on what was found to be the most desired/undesired land uses and most desired visuals of development types from public outreach polls. The East Naples Community Development Plan will use these preferences as a starting point for a land use and development vision; the Plan process includes developing land use concepts in later stages of the project to provide options on how to tailor these use and development preferences to the local community context. These concepts will include regulatory and incentive options to implement these preferences in future development. Aside from land use and development findings, other topics from the Study to note include:

- Community branding
- Landscaping
- Architectural style and sign standards
- Promotion of multiple methods of transportation

US 41 Corridor Study: Land Uses

Desired	Undesired
Shopping/retail variety	Self-storage
Mixed-use, live/work	Gas stations
Restaurants	
Grocery, wholesale club	
Hotel/resort	



Presented here are the most desired and undesired uses identified in the public outreach for the US 41 Corridor Study; desired uses include a lot of business and retail uses; undesired uses include self-storage facilities and gas stations.

US 41 Corridor Study: Commercial Preferences

Strip Mall



51%

Destination Shopping



Destination Shopping

79%

Hotel/Lodging



59%



Respondents to public outreach polls of the 2018 Study preferred the styles of commercial uses you see here (the percentage of respondents selecting these options is shown); preferences include one-story strip mall-style development with Banana Republic as one of the stores included in the image; respondents also preferred multi-story hotel and lodging set back from the roadway with landscaping and multi-story destination shopping with surface parking spots and landscaping. Note that “none of the above” was included as a response option.

US 41 Corridor Study: Residential Preferences



46%

53%

Note: percentages in green include share of respondents selecting the choice shown *and* the “all of the above” choice in the poll that would include choice shown.



40%

58%

Collier County



Respondents to these polls preferred these styles of residential uses; preferences include a multi-story multi-family residence with landscaping and attached residences set back from the roadway with landscaping. Note that the percentage shown in green is the percentage when the “all of the above” responses were included for the options shown.

US 41 Corridor Study: Live/Work, Mixed-Use Preferences

Live/Work Building



42%

59%

Mixed-Use



34%



33%

75%



Respondents to these polls preferred these styles of live/work and mixed-use development; preferences include 2-story live/work units and multi-story mixed-use directly next to the sidewalk and roadway.

US 41 Corridor Study: General Urban Design Preferences

Building Scale



65%

Building Placement



71%



Respondents to these polls preferred these general styles of urban design. The building scale preference shows 1-2 stories in height, and the building placement preference shows a building setback from the roadway with landscaping.

US 41 Corridor Study: Activity Centers



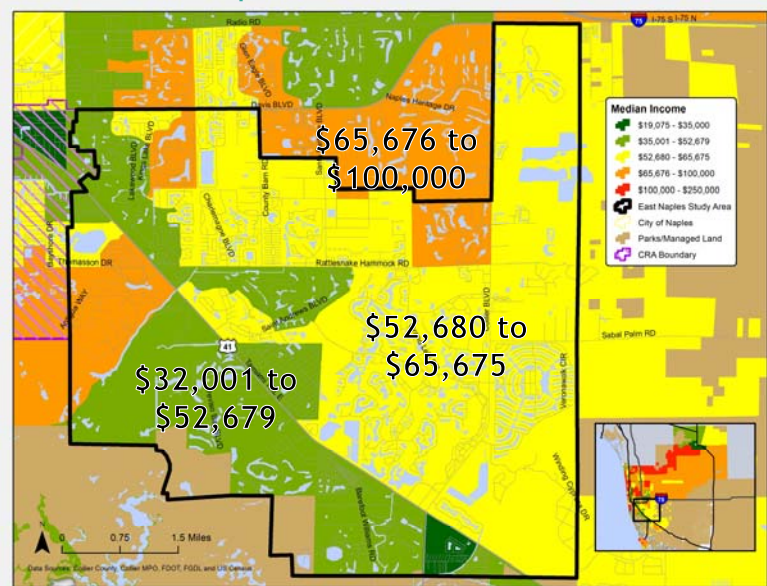
The 2018 Study also highlighted the existing Activity Center nodes and 2 additional smaller nodes for consideration as particular focal points for development.

Background & Existing Conditions



We'll now touch on some community background and existing conditions, which reveal where a community has been and where it is currently. This analysis can inform an attainable vision for the community and steps needed to get there.

Permanent Population & Median Income



East Naples	Unincorp. Collier County
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~Permanent Population*

50,000	364,000
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Median Income

\$52,679	\$57,600
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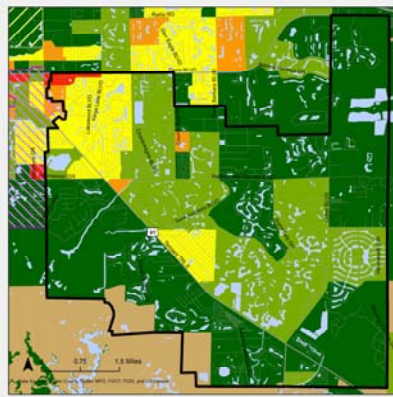
14% of Unincorp. County Population

*Based on American Community Survey data for related census blocks.

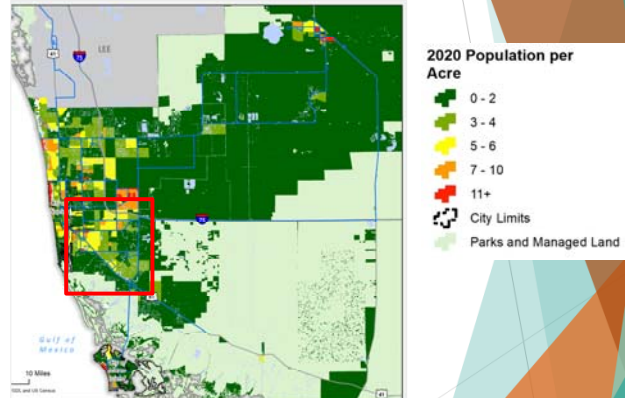
The Study Area has an estimated permanent population of 50,000 (about 14% of the unincorporated county population) and a sizable median household income comparable to the unincorporated county. Median household income provides an indicator of the typical household income in an area. However, the Study Area may face potential challenges in terms of specific population measures, such as population density and seasonal population changes.

Potential Challenge: Lower Densities

Study Area



Countywide



Collier County



Population density is a key consideration because a certain concentration of households within an area may be needed to support local commercial businesses (as opposed to residents traveling elsewhere for purchases). The population per acre is generally moderate to low in the Study Area; there are a few small sections in the 7 to 10 persons per acre range, but most of the study area is at 4 persons per acre or below. Interviews with representatives of the development community indicated that this lower density may be a limiting factor in supporting additional commercial uses in the area.

Potential Challenge: Seasonal Vs Permanent Population

Collier County		East Naples	
Estimated Permanent Households*	Estimated Seasonal Households	Estimated Permanent Households*	Estimated Seasonal Households
42%	58%	40%	60%

*Based on properties claiming homestead exemption (owner-occupied primary residences); does not include rental units with permanent residents, yet changes to the estimate due to rental units are likely minimal since rentals are a small percentage of overall total units (4% countywide and 3% in East Naples).

Date source: Florida Department of Revenue

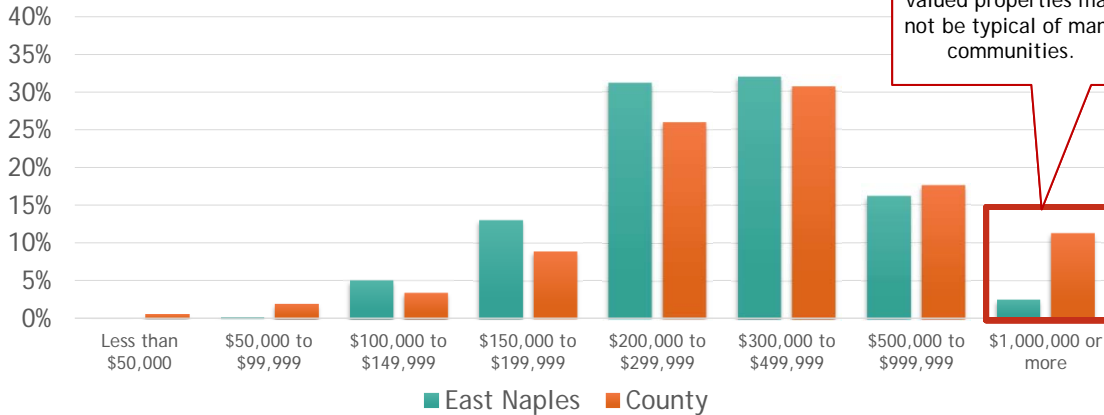
A sizable percentage of households in the Study Area likely house seasonal residents, who are only in the area part-time to shop at local businesses.



Another factor to consider is permanent and seasonal population. We used the percent of homes claiming the homestead exemption as an estimate of permanent population since these homes are owner-occupied and primary residences. We found that 40% of units are likely housing permanent residents. While this does not account for rental units that can't claim the exemption, increases in permanent population from rentals are likely small due to the relatively small number of rental units in the area overall. This estimate suggests that there is a sizable number of seasonal residents; while they can support local commercial uses in the area, they can only do so for part of the year. This finding is similar to the county as a whole.

Housing Trends

Single Family Home Just Value

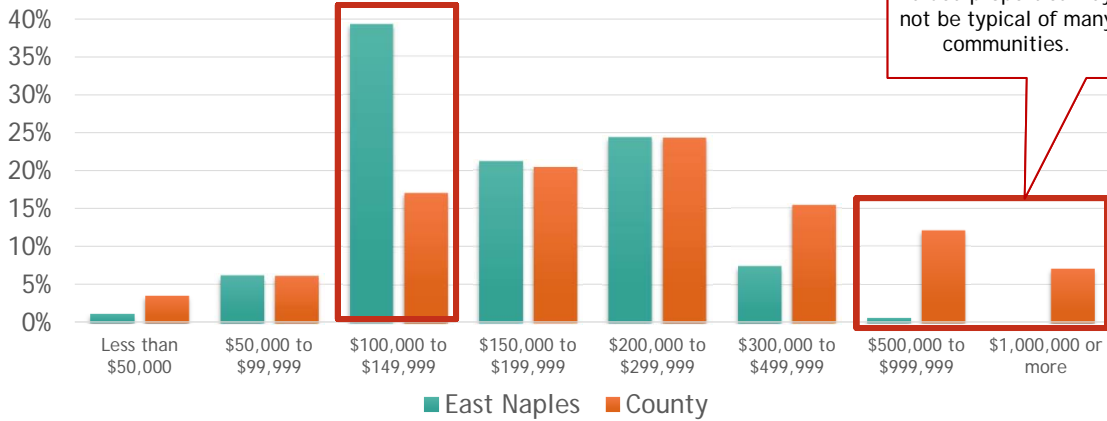


Collier County

In addition to population and income information, our analysis looked at housing trends in the area. “Just value” provides an estimated value of residences based on property appraiser data (note that this estimated value is typically lower than what the current sales price would be). These data indicate that single-family home values are similar to those countywide, with the exception that East Naples has less housing at the extreme low and high values. Note that parts of the county such as Naples tend to have housing values that are high enough to be uncommon among a lot of communities.

Housing Trends

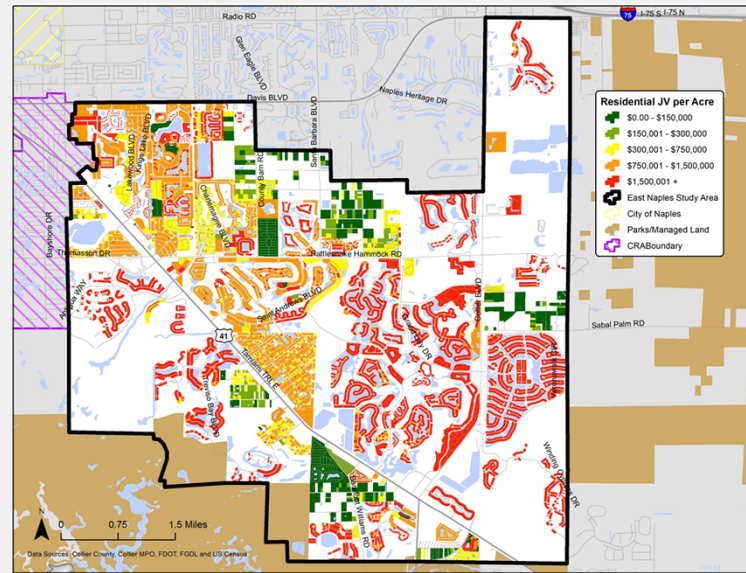
Condo Just Value



Collier County

In terms of condos, East Naples values are similar to the county except that there are fewer high value condos and there is a higher share of condos in the \$100,000 to \$150,000.

Residential - Estimated Value per Acre

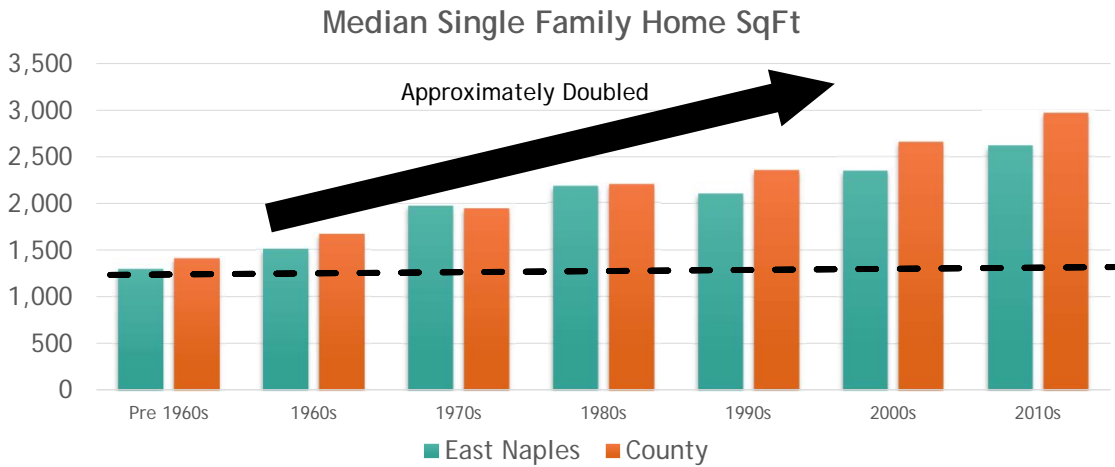


Estimated Value per Acre*	Acres	% of Area
Below \$150,000	350	10%
\$150,000 - \$300,000	180	6%
\$300,001 - \$750,000	470	14%
\$750,001 - \$1,500,000	1,000	31%
Greater than \$1,500,000	1,300	39%

*Based on just value per acre measure

Much of the study area has a sizable estimated value per acre; measuring by acre accounts for areas with higher relative density (such as those with smaller lot sizes), which can support taxable value even if individual home values are lower.

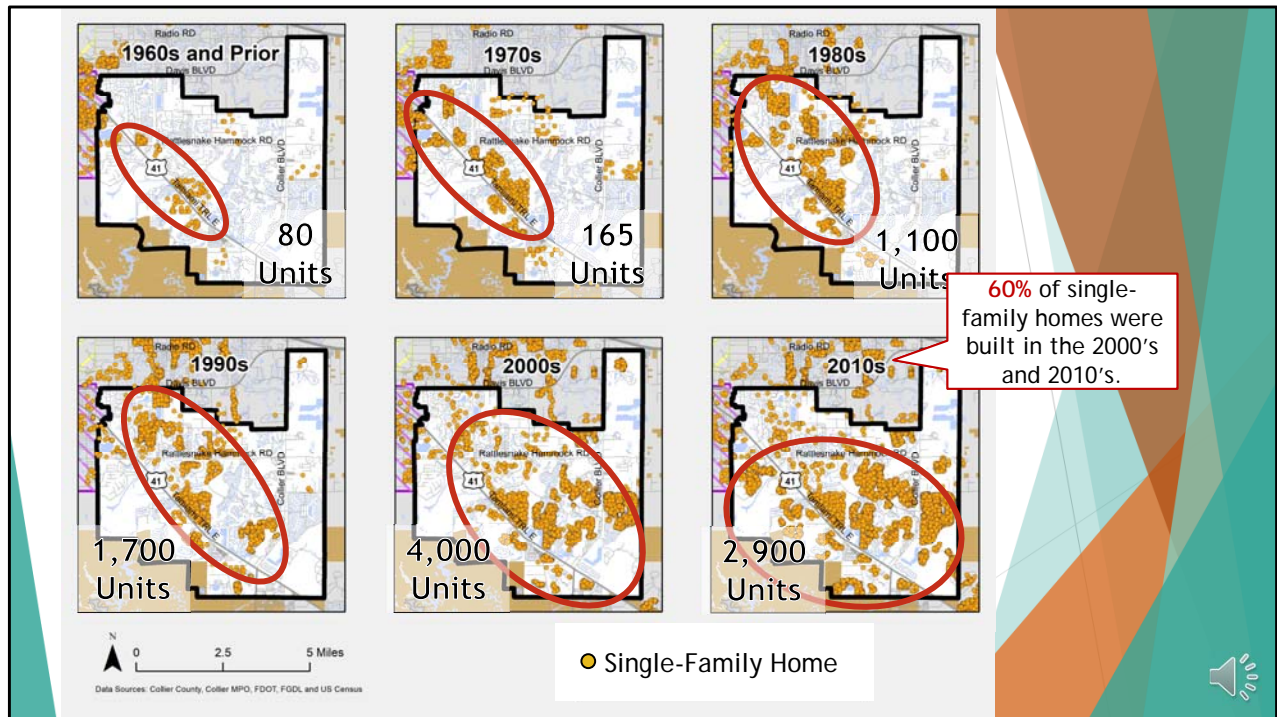
Housing Trends



Collier County



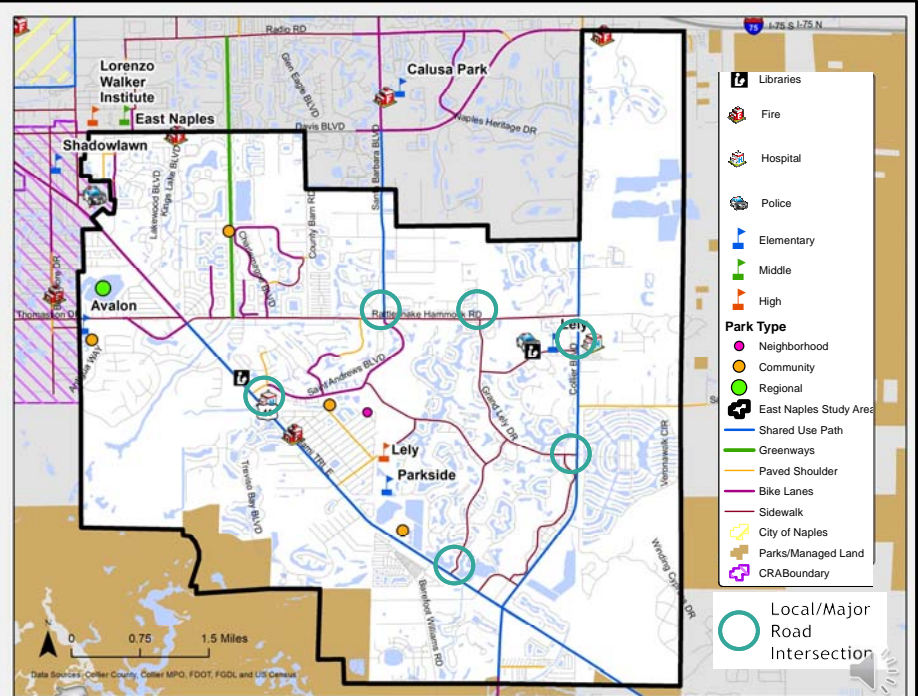
This graph shows how the median square footage for a single-family home has steadily increased since before the 1960's, roughly doubling in size. This finding may have impacts for affordability if housing prices increase with size increases.



This map series shows the decade single-family homes were built or significantly renovated by location. Some of the older homes are along the US 41 corridor or in the western portion of the study area, indicating that there may be a need to renovate or redevelop to improve structural quality. Newer units are also located in these areas but are also significantly located in the eastern portion of the study area. About 60% of single-family homes were built since the 2000's, indicating that they're likely in good structural condition.

Public Assets

- ▶ Many public assets and facilities
- ▶ Potential challenge: neighborhood /main corridor connections



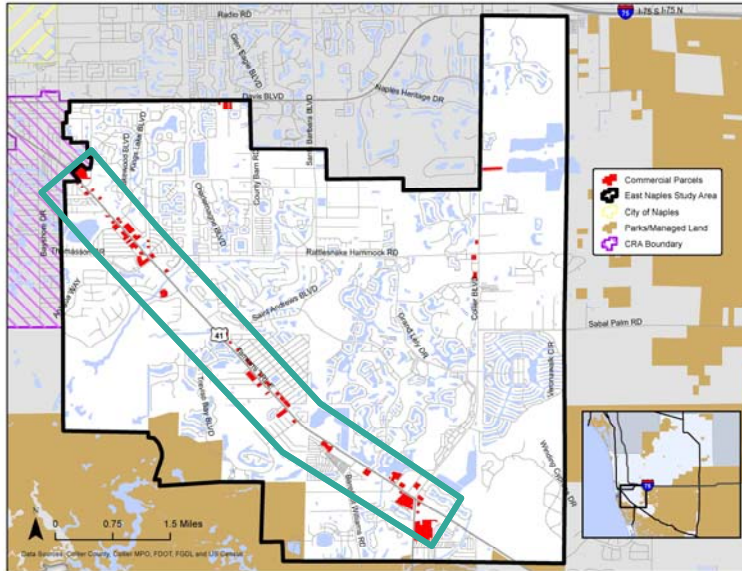
The project team also looked at existing public assets and facilities in the community. This map shows that there are a number of these facilities and assets, including libraries, hospitals, schools, parks, and fire stations. Regarding roads and connections, the map shows the intersections between local roads providing access to residential neighborhoods and major roads where much of the commercial is located. The limited number of these connection points and major roadways in the residential area helps buffer neighborhoods yet may also pose a challenge for residents to access shops, eateries, and other businesses from their homes; it can also limit potential places for new commercial uses to locate, as we will explore in following sections. Later stages of this Plan will evaluate options for making more connections in the area for various transportation methods, such as walking and biking.

Commercial Benchmarks



The limited amount of certain types of commercial uses in the area, such as retail, grocery stores, and hotels, was a key concern highlighted in the 2018 Study. The following slides confirm this finding and offer a way to gauge the amount of existing desired commercial in the Study Area.

Existing Desired Commercial Categories

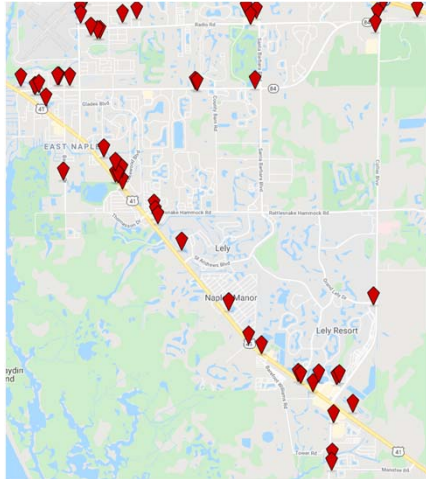


There are **374 acres** of total commercial, **9%** of the total project area.

Existing Land Use*	Acres	% of Commercial Area
One Story Retail	125	33%
Shopping Center	127	34%
Mixed Use	19	5%
Office	26	7%
Restaurants	14	4%
Hotel/Motel	3	1%

The amount of commercial in the study area overall is limited, at only 9% of total project area acreage. The slide shows land use categories that capture desired uses noted in the 2018 Study. The slide indicates that one-story retail or shopping centers make up most of the commercial in the area. Note that some development types may be measured in different categories; for instance, restaurants may be captured in the shopping center, the mixed-use, or the restaurant category. Much of these desired uses are located along US 41.

Vacancy of Existing Structures - Market Demand Indicator



- ▶ Amount of vacancies in existing commercial structures can indicate market demand for type of commercial space in study area
- ▶ Based on review of vacant commercial listings, an estimated **7%** of square footage in the project area is vacant.*

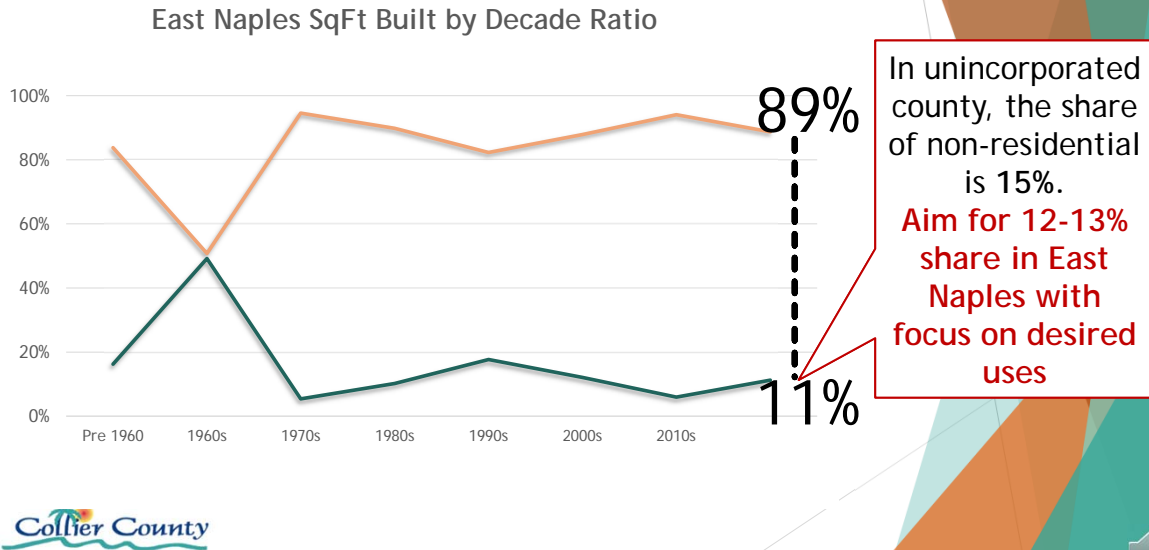
*Based on LoopNet listings in the project area as of April 15, 2020; left: listings in project area and surroundings

Image source: loopnet.com



Before turning towards a discussion on attracting additional desired commercial uses, it is important to note that the amount of additional development in an area depends in part on market demand, over which local governments have limited control. One way to gauge demand is by looking at vacancies of existing built commercial spaces. A high-level review of existing commercial leasing opportunities in the area, based on listings on the internet service LoopNet, provide an approximate vacancy rate of 7%. This suggests that there are existing commercial opportunities not currently being filled by the market, many of which are spread along US 41.

East Naples Non-Residential Building is Relatively Low



The amount of non-residential building (in terms of building square footage), which includes desired commercial uses, has been historically low in East Naples, relative to the amount of residential built. During this past decade, the share of non-residential square footage was 11% of the total. We compared this to the unincorporated county as a whole and found the share in the unincorporated county was 15%. This 15% measure helps gauge where East Naples is relative to other similar parts of the county; while achieving a full increase to 15% may pose a challenge given some of the constraints discussed previously, even getting partway to 15%, such as 12-13%, is a potential target, especially if the increases are made up of the most desired uses.

Square Footage/Acreage for 15% Share of Non-Residential Square Footage

Res. Benchmark	Non-Res. Benchmark	Additional Commercial Square Feet Needed	Additional Commercial Acres Needed
88%	12%	1.3 million	99
87%	13%	2.0 million	157
86%	14%	2.7 million	214
85%	15%	3.4 million	270

Build-out not only depends on factors like regulations and incentives, but also market demand.

Note: these numbers assume the current level of residential square footage and square footage/acreage added in addition to filling vacancies in existing commercial buildings.



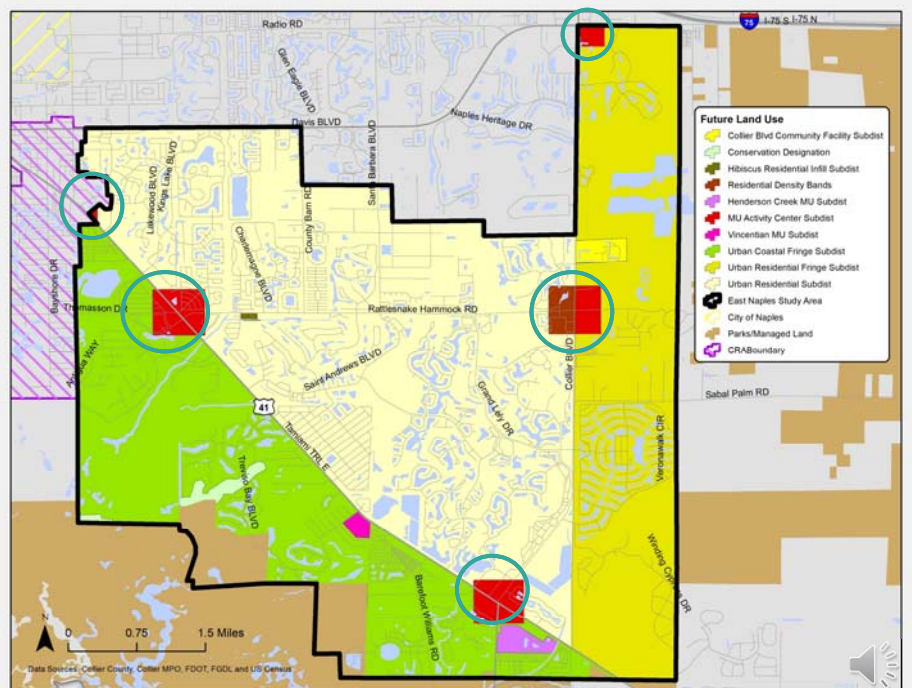
Given the 15% benchmark, we estimated how much square footage and acreage the East Naples area would need to add in commercial uses, with a focus on the most desired uses, if it were going to move towards this benchmark. We assumed the current amount of residential square footage and that vacancies in existing commercial buildings were filled. The table above shows amounts needed to reach 12-15% shares, ranging up to about 3.4 million square feet or 270 acres of commercial uses for the 15% benchmark. Again, attracting additional amounts of development depends not only on regulations and incentives overseen by the County, but also general market factors outside of the County’s control.



We will now talk about different approaches and location considerations to try to progress towards these benchmarks.

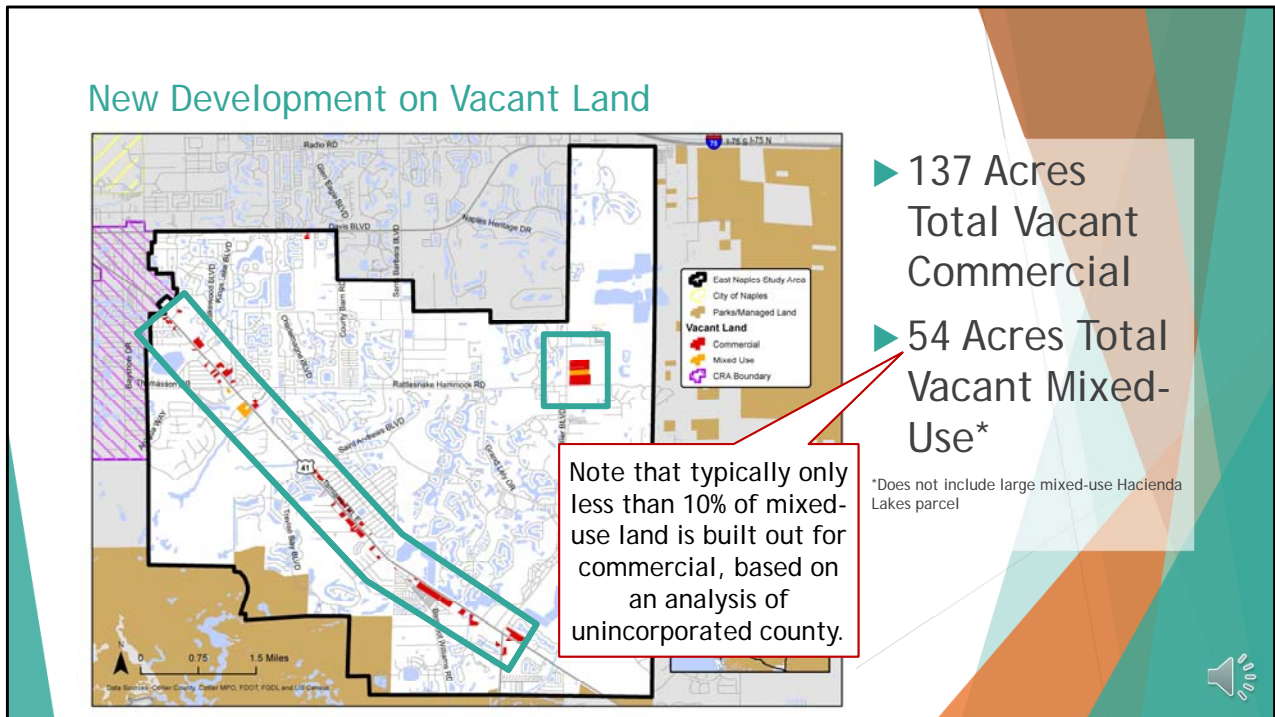
Mixed Use Activity Centers

- ▶ Defined in Growth Management Plan
- ▶ 530 Acres
- ▶ 3% of Area



To start with, Activity Centers are areas formally defined in the Collier County Growth Management Plan that are intended for more intense and mixed-use development relative to single-family residential areas. We then looked at on-the-ground development patterns to understand how the current development landscape and potential future opportunities compared.

New Development on Vacant Land



Aside from filling vacancies in existing commercial buildings as shown earlier, the most straightforward areas to encourage new business and commercial uses are vacant commercial and mixed-use lots; they are already zoned for commercial uses and do not have existing buildings. The map above shows that there are several existing vacant commercial and mixed-use properties, primarily along US 41 and around the intersection of Rattlesnake Hammock Road and Collier Boulevard. Note that while there are 54 acres of vacant mixed use land in the Study Area that likely have potential for commercial development, typically only 10% of mixed-use land is used for commercial, based on building patterns observed in unincorporated county. Additionally, many of these properties are along major thoroughfares which helps buffer residential neighborhoods from the major roadways and allows those neighborhoods to remain cohesive residential areas; however, as noted earlier, this can also make roadway access between neighborhoods and commercial uses challenging. Any efforts to develop these sites need to promote access to the new developments.

Build-Out Scenario: No Intensification

% Benchmark	Acreage Benchmark	Vacant Commercial Acres Used	Vacant Mixed-Use Acres Used	Remaining Acreage Needed
		If 137 used of 137 total	If 5 used of 54 Total	
12%	99	137	5	0
13%	157			15
14%	214			72
15%	270			128

Based on 10% build-out for commercial seen in unincorporated county

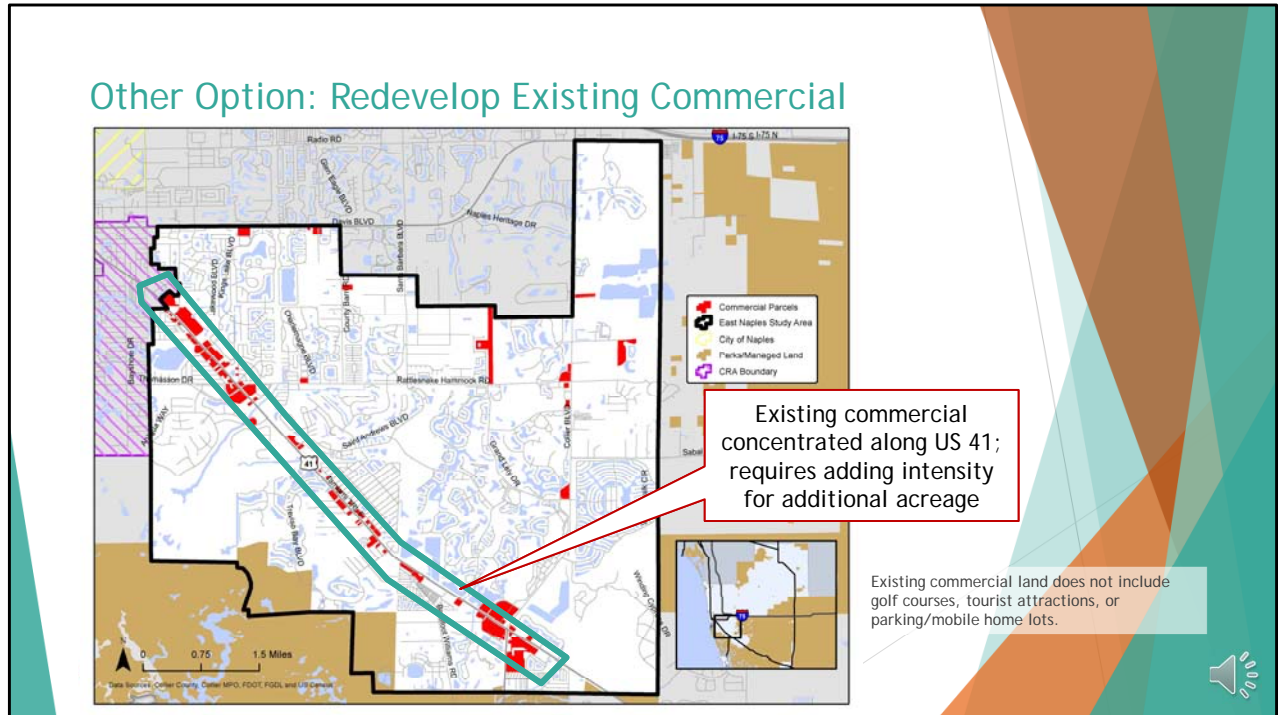
Existing vacancies in built structure may make it harder to fully build out vacant lots; incentives and other strategies may help

Achieving remaining acreage would require building additional intensity on vacant/redeveloped commercial land; again, depends on market demand



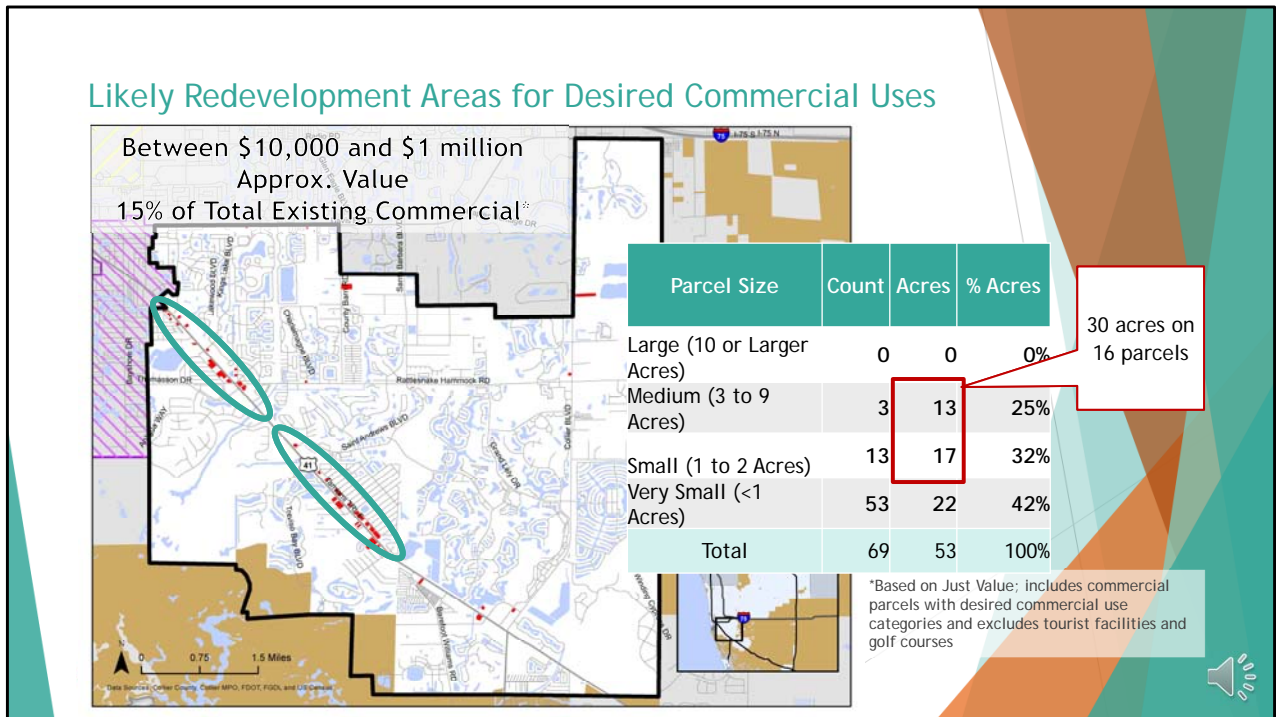
If the County could employ a strategy to influence the market and achieve a full build-out of vacant commercial land and a more moderate build-out of vacant mixed-use land for commercial, the Study Area could achieve the 12% non-residential square footage benchmark. Achieving the higher benchmarks would require additional intensity on vacant commercial and mixed-use land or on existing commercial land that is redeveloped. Again, the ability to achieve this build-out depends on market demand and the ability to influence it.

Other Option: Redevelop Existing Commercial



Aside from new development, existing buildings can be redeveloped to update structures and provide additional commercial opportunities. Commercial structures, particularly those already zoned for desired uses, are the most straightforward, yet note that to get an increase in commercial uses, more intensity would need to be added to these sites. Redevelopment could be encouraged at the existing intensity to attract different, more desirable uses.

Likely Redevelopment Areas for Desired Commercial Uses



This slide shows more likely commercial redevelopment opportunities based on value of parcels that can currently accommodate desired commercial uses; parcels valued between \$10,000 and \$1 million are considered more likely to redevelop since they are not too costly; note that values below \$10,000 were excluded to remove any abnormally low values that may not accurately reflect the true parcel value. Most of these parcels are located along the US 41 corridor. We then looked at size since larger parcels can be easier to redevelop. Looking at parcels larger than an acre in size, there are about 16 with a total of 30 acres among them.

Build-Out Scenario: Intensification

% Benchmark	Acreage Benchmark	Vacant Commercial Acres Used	Vacant Mixed-Use Acres Used	Redeveloped Commercial Land	Remaining Acreage Needed
		137 used x 1.25 Additional Intensity	If 5 used of 54 Total	30 x 1.25 Additional Intensity	
12%	99				0
13%	157				0
14%	214	171	5	7.5	31
15%	270				87

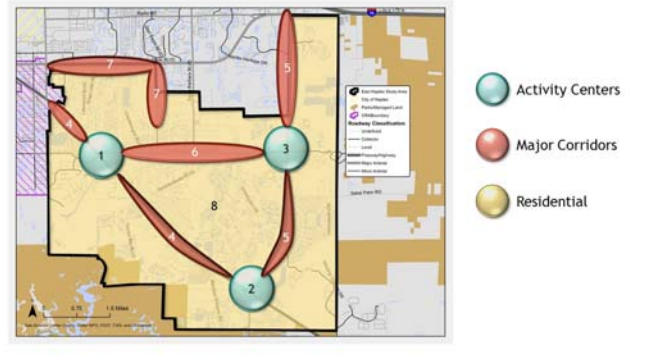
Assuming an intensity increase of a quarter of existing amount on vacant and redeveloped land



If the County successfully engaged in more robust approaches to encourage additional commercial development on vacant land and land for redevelopment, increasing intensity on these lots, additional acreage may be achieved. In the scenario shown on this slide, if the County allowed and could successfully incentivize an increase by a quarter of existing intensity, the area could achieve additional commercial acreage for the 13% benchmark.

Your Preferred Focus Areas

- ▶ We've provided information for consideration
- ▶ Now share your preferred focus areas to evaluate opportunities for new desired commercial



You've now seen some of the more likely areas for additional commercial opportunities. We want to confirm this approach with you through our survey – you can let us know what places in the study area you think we should be evaluating for opportunities; see the project website at the end of this presentation to access the survey.

What Tools are Available?

- ▶ Marketing campaign for area
- ▶ Adjust regulations for site requirements
- ▶ Evaluate and adjust amount of commercial development allowed
 - ▶ Incentives to encourage full build-out
- ▶ Allow/encourage adjustments to commercial lot depths
- ▶ Evaluate and adjust amount of residential allowed
 - ▶ Incentive to encourage full build-out
- ▶ Incentives:
 - ▶ Design flexibility
 - ▶ Expedited permitting
 - ▶ Fee reductions/waivers
 - ▶ Others



So how do we influence the market to produce more desired commercial opportunities? Some tools, such as a marketing campaign and regulatory or incentive adjustments within the existing lot sizes and allowed amounts of development, provide a more moderate approach. These tools can be used first to see if they have the desired effect without larger changes. If more robust measures and incentives are needed, other approaches could be explored. These include adjustments to lot depths on the corridor, as well as allowing and encouraging more commercial intensity on sites. This approach can also be explored for residential uses in the area to allow and encourage more residential units and provide a larger customer base for local commercial.

2018 US 41 Corridor Study: Implementation Preferences

Method	Support (% of Poll Respondents)
Impact fee incentives for tear-down/rebuild	Moderate (42%)
Overlay standards for building design	Moderate (36%)
Branding effort for identity and marketing	Strong (62%)



We will also note preferences collected in the 2018 Study related to implementation as we evaluate options. Poll respondents moderately or strongly preferred implementation methods that include impact fee incentives for tear-down or rebuilding of structures, overlay standards for building design, and a branding effort for community identity and marketing purposes.

Next Steps



We'll now talk about next steps.

Details on Approach

Public Meeting 1 and Survey	Draft Goals, Concepts, Recs	Public Meeting 2 and Survey	Plan Development & Approval
Preliminary findings Community vision - character and descriptors Land use concept locations, site considerations Supporting considerations - assets, services, transportation Approach moving forward	High-level goals and recommendation options, including transportation Land use concepts Regulatory and incentive-based implementation options	Review and build consensus on draft goals, recommendations, and concepts for refinement	Draft plan development Public approval meetings and finalized plan



Once we've had a chance to hear from you on our preliminary findings and approach, we will start to draft high-level goals and recommendation options for the themes of the study. We will also develop land use concepts based on community feedback (more on this on the next slide). Once we draft these items, we will bring them back to the community for review and feedback, then use the information to draft a final plan for approval.

Land Use Concepts

- ▶ Tailor preferred development styles to local context
- ▶ Account for prioritized uses and intensity
- ▶ Detail needed zoning and design regulations



The land use concepts developed in the second part of this project will account for more specific development program considerations in terms of uses, zoning and urban design regulations needed, and other implementation considerations. These concepts will include visuals that account for preferred visuals from the 2018 Study and current sites in the Study Area to show how preferred development styles can be tailored to the local context.

Thanks for joining! We want to hear from YOU

- ▶ Take the survey and leave further comments at the project website:
<http://colliercountyfl.gov/EastNaplesCDP>
- ▶ Need to get in touch? Email us at:
ENCDP@colliercountyfl.gov



Thanks for joining us! Follow the website link to access the project survey and provide feedback; you can also reach out by email at ENCDP@colliercountyfl.gov.