

EAST NAPLES

COMMUNITY DEVELOPMENT PLAN

Technical Memorandum 1:
Background & Needs Assessment

September 28, 2020

Prepared for



Prepared by



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1.0 Introduction

Collier County has contracted with Tindale Oliver to collaborate with the East Naples community and create an East Naples Community Development Plan. Map 1 shows the general focus area for this plan, including a Study Area for running data and spatial analysis for the study, presented later in the technical memorandum. The project team also recognizes the importance of accounting for conditions and development in the surrounding area and will note aspects of this Area of Influence during the preliminary analysis that will affect outcomes (e.g., major retail development, roadway connections, etc.).

Map 1: Study Area and Area of Influence



This project intends to follow up on the US 41 Corridor Study completed for this area in 2018 (discussed in more detail in Section 3.0). Accounting for findings from the 2018 study, the purpose of the East Naples Community Development Plan project includes the following points:

- Establish a community vision
- Guide future land use and development in the area with the following:
 - Encourage desired uses and discourage undesired uses

- Evaluate commercial development and redevelopment options to promote desired commercial uses
- Create and build consensus on land use concepts for the area
- Inventory community assets and services
- Provide high-level options to promote multiple methods of transportation, such as walking and biking.

This Technical Memorandum provides findings from the background assessment which will serve as a basis to develop goals, recommendations, and land use concepts in the later stages of the East Naples Community Development Plan process. This assessment includes data-based and spatial analysis; a review of existing plans and documents related to the area, including a review of the Growth Management Plan and Land Development Code; and engagement with the public and specific stakeholders. Findings from the assessment are organized in the remaining sections as follows:

- **Section 2.0: Summary of Findings** – provides key takeaways from the Background and Existing Conditions Assessment.
- **Section 3.0: US 41 Corridor Study Overview** – summarizes the process and key outcomes from the 2018 corridor study that serve as a basis for the East Naples Community Development Plan project.
- **Section 4.0: Demographics** – analyzes available data on population and related characteristics as context for later analysis in the Technical Memorandum.
- **Section 5.0: Land Use and Market Analysis** – compares land uses and development between the East Naples area and the broader county, with additional sections specific to residential and commercial development; the commercial development section looks at how to benchmark and increase desired commercial uses in the project Study Area.
- **Section 6.0: Community Assets** – inventories current assets and services and documents performance and planned improvements.
- **Section 7.0: Policy Review** – summarizes key points in the existing Growth Management Plan and Land Development Code that may be areas of focus for implementation options analyzed in later tasks of the project.
- **Section 8.0: Public/Stakeholder Involvement** – summarizes process and findings from public and stakeholder involvement, with analysis on how these findings will be incorporated into the project.
- **Section 9.0: Appendices** – provides additional related information:
 - Appendix A: US 41 Corridor Study Development Style Preferences
 - Appendix B: Additional Transit Improvement Information
 - Appendix C: Online Public Survey Summary
 - Appendix D: Public Workshop 1 Recap

2.0 Summary of Findings

The following are the key takeaways from this preliminary Background and Needs Assessment on the project Study Area and Area of Influence:

- Key aspects of the vision for the area based on public outreach for this project and the 2018 US 41 Corridor Study included the following:
 - Balanced development: making sure that any new development is of good quality and does not overwhelm existing assets and natural places in the community.
 - Diverse and quality commercial: the community is seeking more commercial options of higher quality that allow for a broader range of places to shop, eat, and have fun.
 - Beautification and green space: part of balanced and quality development is ensuring that the development is visually pleasing and that there is ample green space and natural spaces maintained in the community.
 - Transportation options: future efforts in the area should ensure a range of safe options, including non-motorized options such as walking and biking, with improved connections between neighborhoods and local destinations.
- The area generally has good coverage by public facilities and services but would particularly benefit from improvements to provide better transportation options, including non-motorized options such as walking and biking, for localized travel.
- The area is generally underserved in terms of non-residential uses, with only 11% of current square footage built as non-residential relative to the unincorporated county as a whole that has a share of 15% non-residential square footage. Some community members expressed concern about adding more commercial development to the area, likely linked to concerns about over-building and crowding the area. The points in the remainder of this summary will help define how to guide future development to moderate it and achieve desired development while limiting undesired development.
- The area may already face some potential limitations to adding more commercial uses, which may moderate the amount of development that could be reasonably anticipated. While this planning effort did not involve a comprehensive market analysis, it did include some preliminary outreach and analysis to identify possible limiting factors to development in the area for further consideration:
 - Roadway connections: there are a limited number of connections between the large residential areas, particularly at the center of the Study Area, and larger roadways that contain most of the commercial businesses in the area. While this land use and transportation pattern can help buffer residential areas, it also can create challenges for neighborhood residents to access commercial and other local destinations, particularly by non-motorized means. It can also limit the

locations where new commercial businesses might locate and be compatible with surroundings.

- Population density: East Naples is similar to Collier County as a whole in that most of the area is relatively low density (4 persons per acre or below); an interview with representatives of the development community noted this may be a limiting factor to having a local residential base that can support local commercial uses.
- Seasonal population: East Naples is also similar to Collier County as a whole in that it has a high estimated seasonal population; this analysis estimated seasonal households at around 60% of total households, based on homestead exemptions and the limited share of rental units relative to total units. This finding indicates there may be some limits to the population that is in the area year-round to support local commercial uses full-time.
- General market demand: there may be other factors influencing the market demand for commercial space in the area; while the County does not have control over the private market, this analysis evaluated ways it might influence market demand to attract desirable development.
- An important starting point for ensuring desirable future development is to implement limitation on undesired uses and ensure that new development being built is a desirable use for the community.
 - Limit undesired uses: undesired uses include several auto-oriented uses, such as car washes, fast food establishments, and gas stations, and warehousing. Certain limitations are already in place or are under consideration, such as spacing requirements for gas stations and design requirements in C-4 commercial districts to incorporate warehousing into mixed-use development; this study will look into other ways that these uses might be limited.
 - Attract desirable uses: desirable uses as identified through outreach from the 2018 US 41 Corridor Study and efforts as part of this plan identified several desirable uses that tended to be commercial, including: retail/shopping, mixed-use and live/work units, restaurants, grocery stores, hotels/resorts, entertainment, services such as healthcare, and businesses that create jobs; respondents to the public survey for this planning effort indicated that restaurants are a particular priority.
 - Additional comments from the public survey for this plan indicated a desire to ensure ample green space and natural spaces in the area.
- Development and redevelopment options to provide additional desired commercial uses should focus primarily on the US 41 corridor and nodes, as well as viable opportunities along Collier Boulevard.
- Design is a critical component of desirable future development for the community, based on input from the public survey. Key points of desirable design to incorporate into

land use concepts for the East Naples Community Plan include the following, based on visual preferences from the 2018 US 41 Corridor Study outreach efforts and the public survey for this plan:

- Buildings set back from the roadways with landscaping
- Potential for a range of heights from one to low multi-story, being mindful of concerns about overbuilding
- Park once at a cluster of establishments and walk between them; walkable development concepts (e.g., an open mall)
- Preferred implementation methods also influence the approach for attracting development and anticipated outcomes. Based on results from outreach completed as part of the 2018 US 41 Corridors Study and the public survey for this planning effort, more moderate measures of a marketing campaign to promote the area and incentives, such as fee reductions/waivers and expedited permitting, has more widespread support relative to more robust measures, such as allowing and encouraging more intense commercial and/or residential development.

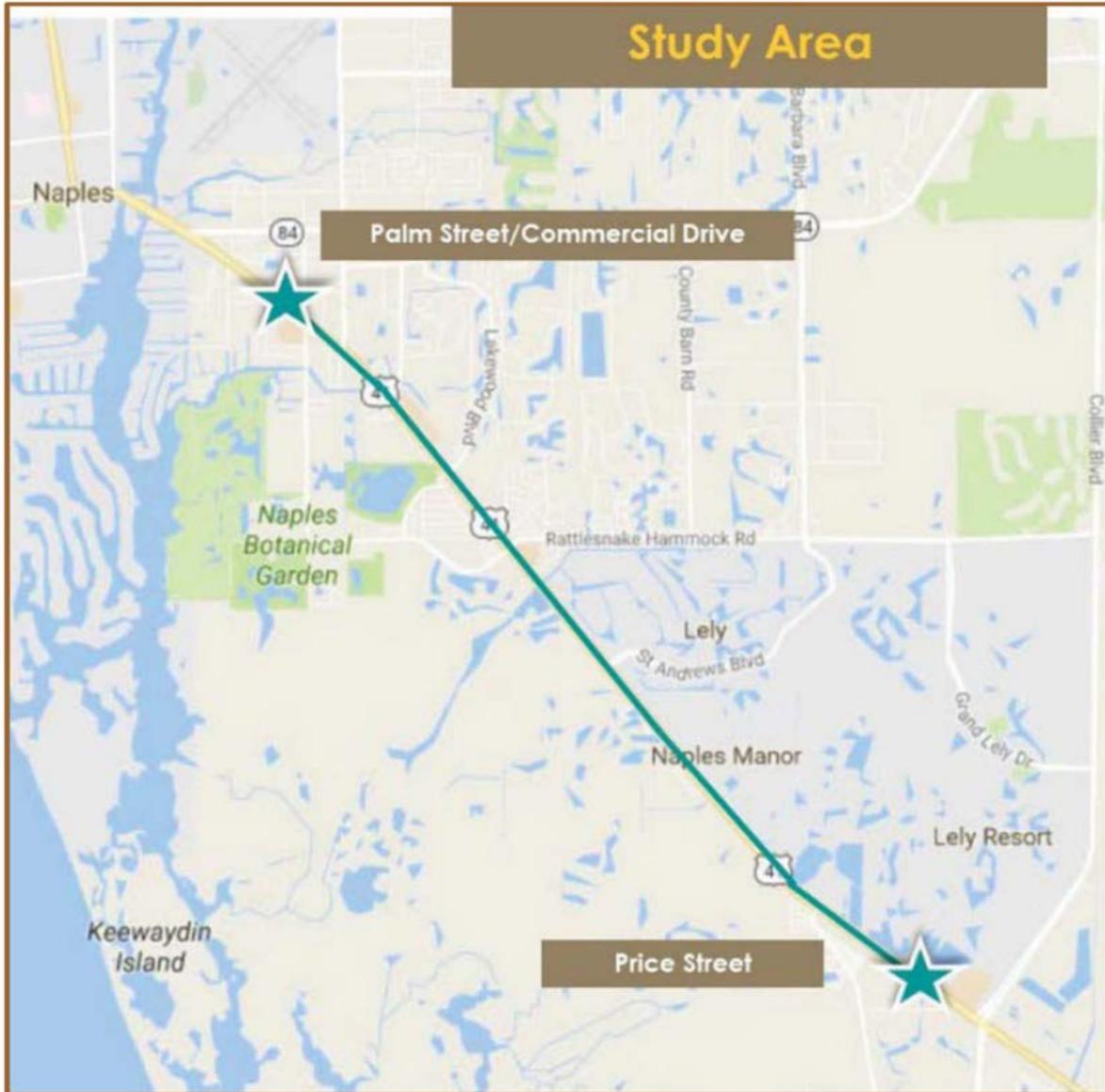
3.0 US 41 Corridor Study Overview

As mentioned in the introduction, the US 41 Corridor Study completed in 2018 serves as a basis for the East Naples Community Development Plan effort. Map 2 shows the corridor segment of focus for the study; note that the East Naples Community Development Plan expands on this area of focus to include surrounding neighborhoods and other major roadways.

The 2018 Study aimed to determine public preferences for future development types and uses along this segment of US 41 so that those types of development and uses could be facilitated and incentivized through Comprehensive Plan policies and Land Development Code updates. Findings were based on input and polling results, including results from visual preference surveys, from three stakeholder meetings and three public meetings held as part of the study. Findings and recommendations emerged from the study that touched on the themes of land use, urban design, transportation, landscaping, and community branding.

The East Naples Community Development Plan will build on these findings, focusing particularly on the preferences for land uses and development style as a basis for a vision for the built landscape in East Naples and related activities; these ideas will be incorporated into land use concepts developed later in the East Naples Community Development Plan process to create concepts tailored to the local community context, along with regulatory and incentive options to implement these preferences in future development.

Map 2: Study Area from 2018 US 41 Corridor Study

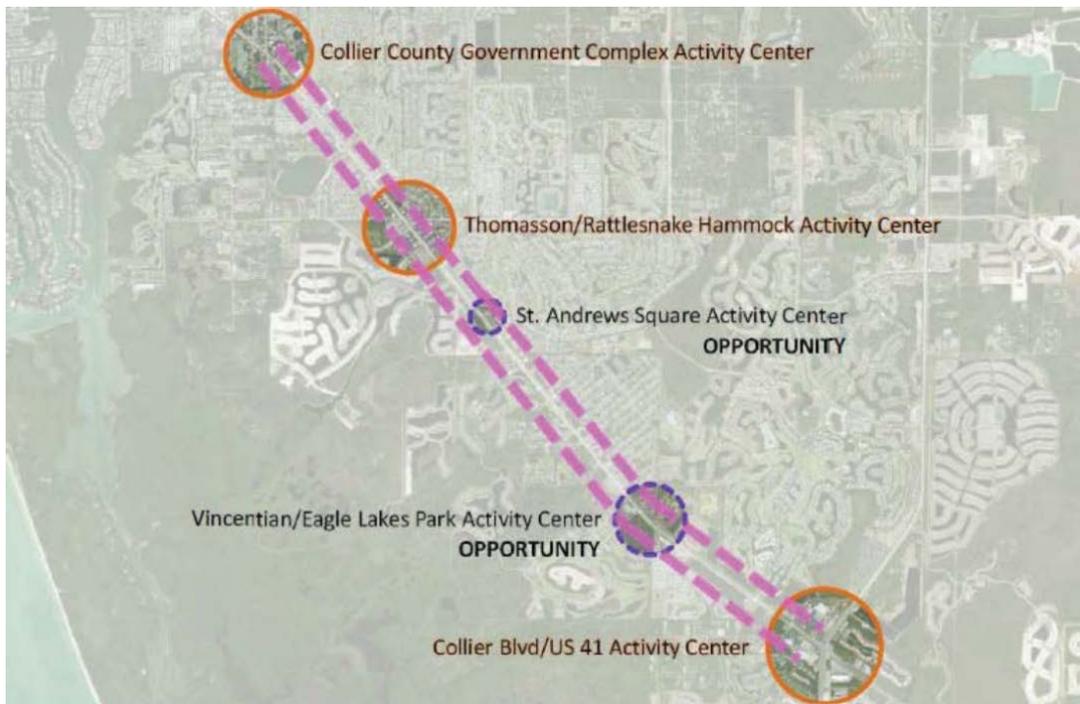


The most desirable and undesirable uses that emerged from the Study are shown in Table 1. Commercial development preferences included strip malls, destination shopping, and hotel/lodging styles; residential development preferences included multi-family options. Preferences also included live/work and mixed-use developments. Appendix A includes more details on the preferred visuals, as well as general urban design preferences. The Study also included support for nodal development, including existing activity centers, as shown in Map 3.

Table 1: Use Preferences from 2018 US 41 Corridor Study

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

Map 3: Activity Center Recommendations from the 2018 US 41 Study



4.0 Demographics

Population

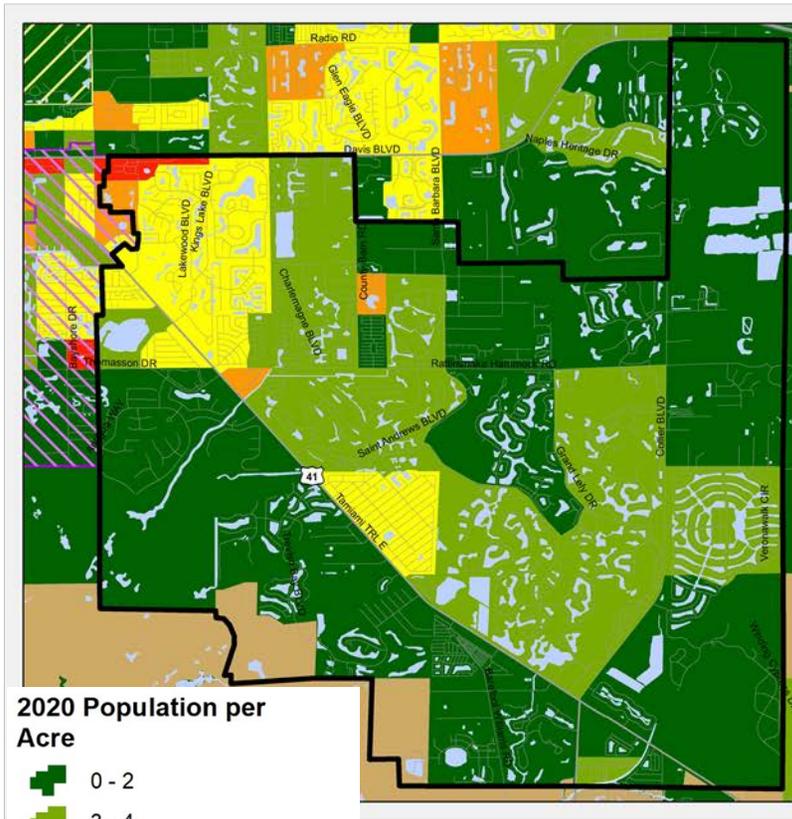
The Study Area has an estimated permanent population of 50,000, about 14% of the estimated total population for the unincorporated county at 364,000. However, it may face potential challenges in terms of specific population measures, such as population density and seasonal population changes.

The population density is generally limited throughout Collier County apart from certain pockets shown in red in Map 4, including parts of the Golden Gate area, coastal communities such as Naples and its surroundings (adjacent to the Study Area), and Immokalee, among others. Much of the Study Area is at four persons per acre or less, which coincides with certain density limitations in the growth management plan due to factors such as the Coastal High Hazard Area where density is limited (see Section 7.0). Interviews with representatives of the local development community indicated that low density could be a limiting factor to achieving certain aims in the Study Area, such as increasing the amount of desired commercial uses, as discussed more in Sections 5.0 and 8.0.

Additionally, the area has a sizable seasonal population, like Collier County as a whole. Approximately 57% of non-rental households in the study area are estimated to be seasonal, compared to approximately 53% countywide. Since these residents are only in the area part of the year, they are more limited in the extent to which they can support local businesses. This analysis used properties claiming the homestead exemption (which are owner-occupied, primary residences), based on 2019 Florida Department of Revenue data, to estimate permanent population. While this measure does not account for rental units housing permanent residents (rental units cannot claim the exemption), increases in permanent population from rentals are likely small since traditional multi-family units that are typically rental do not make up a sizable share of total units overall in the area. In the Study Area, there are 2,000 traditional multi-family apartment units, equaling 6% of the total 31,000 housing units in the area; Countywide, there are 22,000 traditional multi-family units, equaling 10% of the total 221,500 units. In the unlikely event that all these rental units housed permanent residents, the seasonal household share estimate would be approximately 54% for the Study Area, 48% countywide. In this case, roughly half of all households would still be seasonal. Some degree of additional rental units may occur in other housing type categories.

Map 4: Population Density in the Study Area and Countywide

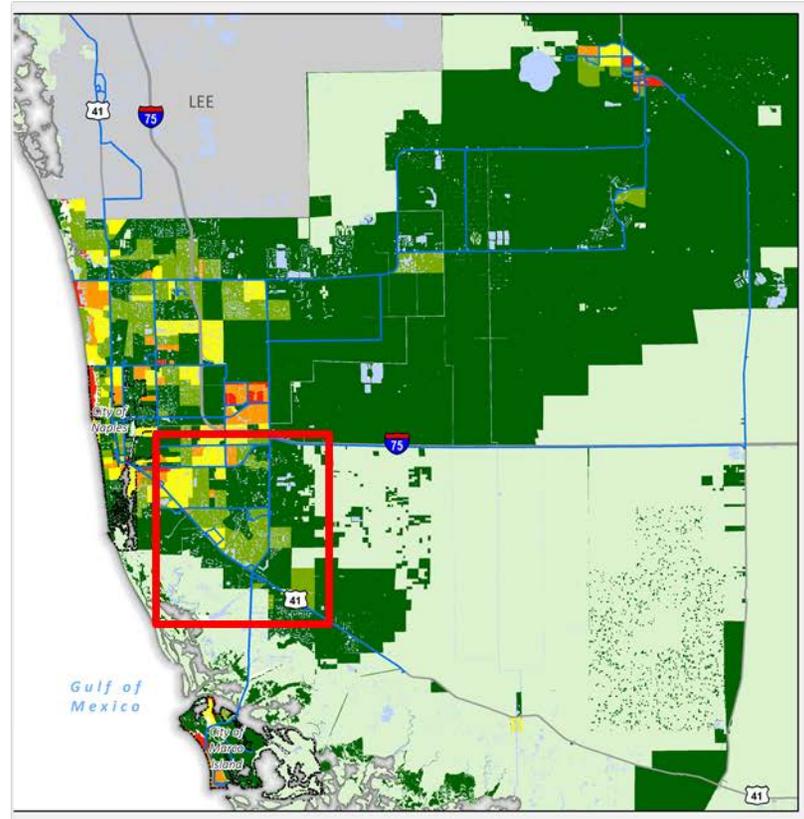
Study Area



2020 Population per Acre

- 0 - 2
- 3 - 4
- 5 - 6
- 7 - 10
- 11+
- City Limits
- Parks and Managed Land

Countywide

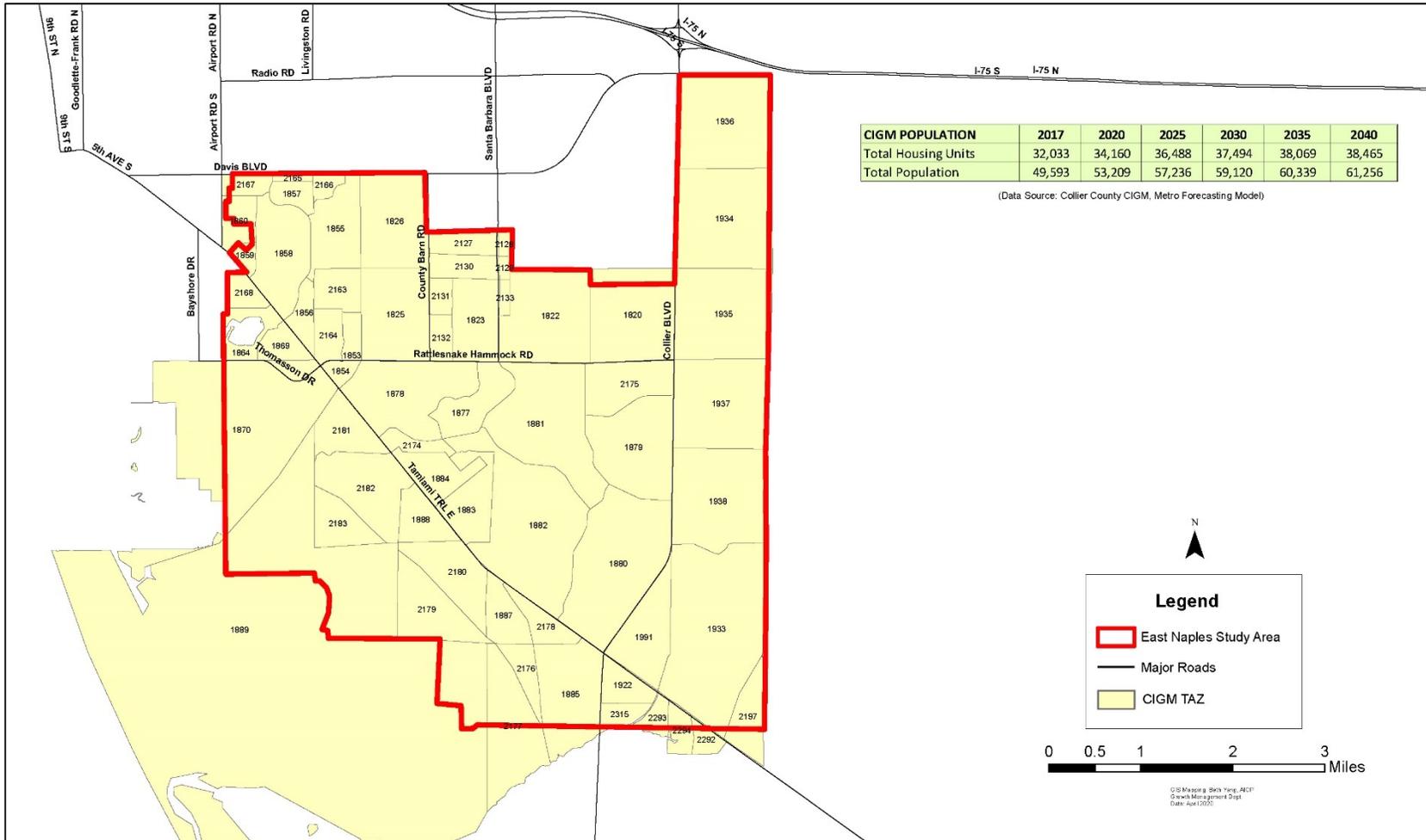


Source: American Community Survey 2018 5-Year Estimates

Regarding future population, the Collier Interactive Growth Model (CIGM) is one method used for population forecasting based on Traffic Analysis Zones (TAZs, see Map 5). The model forecasts that the number of housing units will approach 40,000 and that the population will reach just over 61,000 by 2040; note that the possibility of this growth in the Study Area depends on the land use regulations and future build-out for vacant areas and redevelopment of existing residential, including if more multi-family is built. The Study Area has seen multi-family units being built, as discussed in Section 5.0; however, there are certain limitations on allowable density in parts of the Study Area due to restrictions in the Coastal High Hazard Area and Urban Residential Fringe subdistrict that cover large portions of the Study Area containing sizable amounts of the 187 acres of remaining vacant residential land in the area (see Section 7.0). Depending on these outcomes, there may be some degree of additional permanent population concentrated within the study area to support aims of the East Naples Community Development Plan such as increasing desirable local commercial uses, offsetting some of the effects of lower population density and higher shares of seasonal population. More information on forecasts from this model for commercial demand are provided in Section 5.0. Note that some of the TAZs extend out beyond the boundaries of the study area, yet mainly towards the southwest coastal area where there is a lot of land protected from development; as a result, the increase in dwelling unit and population estimates beyond those strictly within the study area boundaries are likely moderated.

Map 5: East Naples Housing Unit and Population Estimates through 2040

**POPULATION ANALYSIS FOR EAST NAPLES STUDY AREA
USING COLLIER INTERACTIVE GROWTH MODEL
(POPULATION DEMAND)**

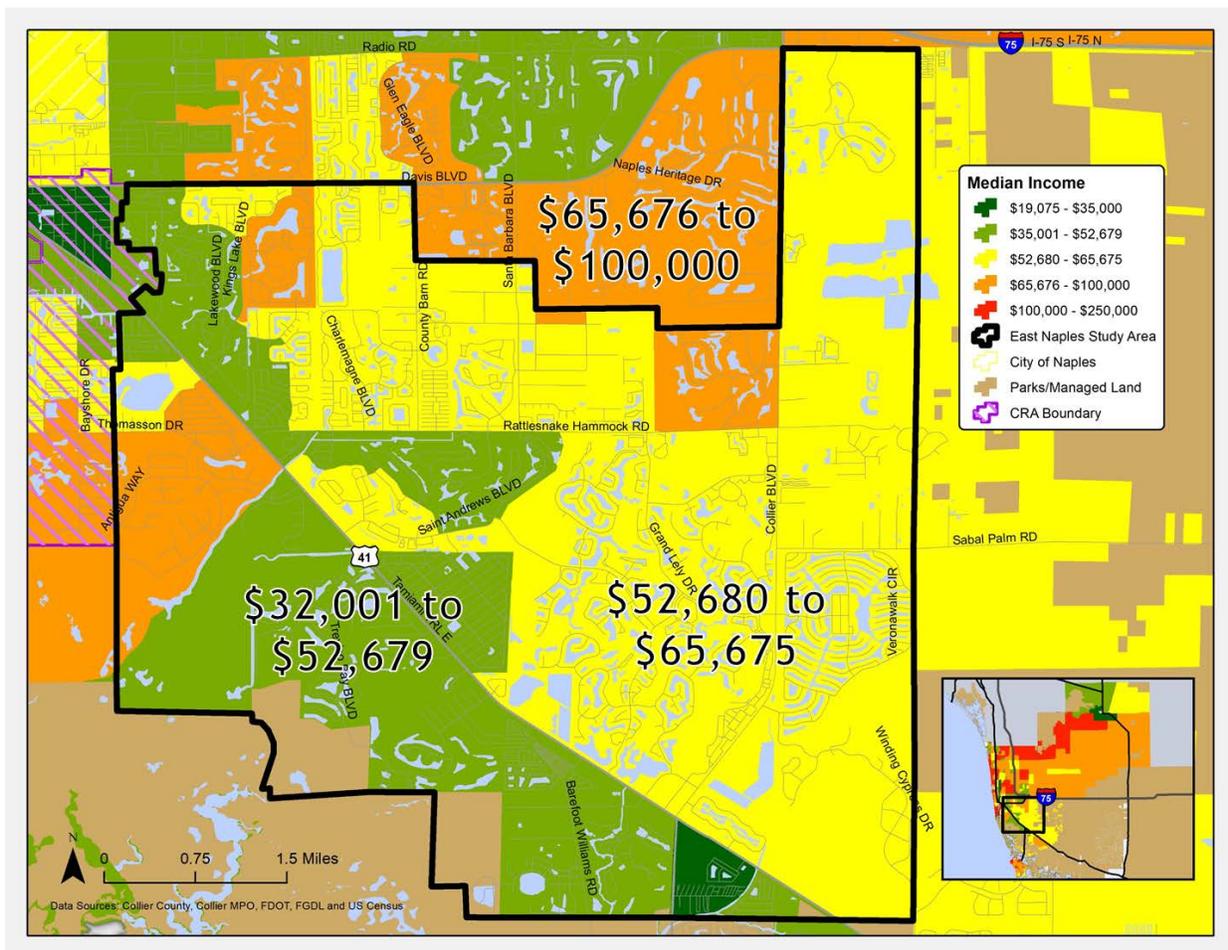


Source: Collier Interactive Growth Model

Income

In addition to population, income is an important factor to consider, particularly in terms of discretionary income available to spend at local shops and businesses. The study area has a sizable median income overall that is comparable to the unincorporated county (\$52,679 versus \$57,600, respectively). Map 6 shows the variation in median income levels in different parts of the study area, with some falling below the East Naples overall median income to the east of the area and south of US 41, while other areas range up to well above the county median income at nearly \$66,000 and \$100,000.

Map 6: Median Income for the Study Area Census Block Groups

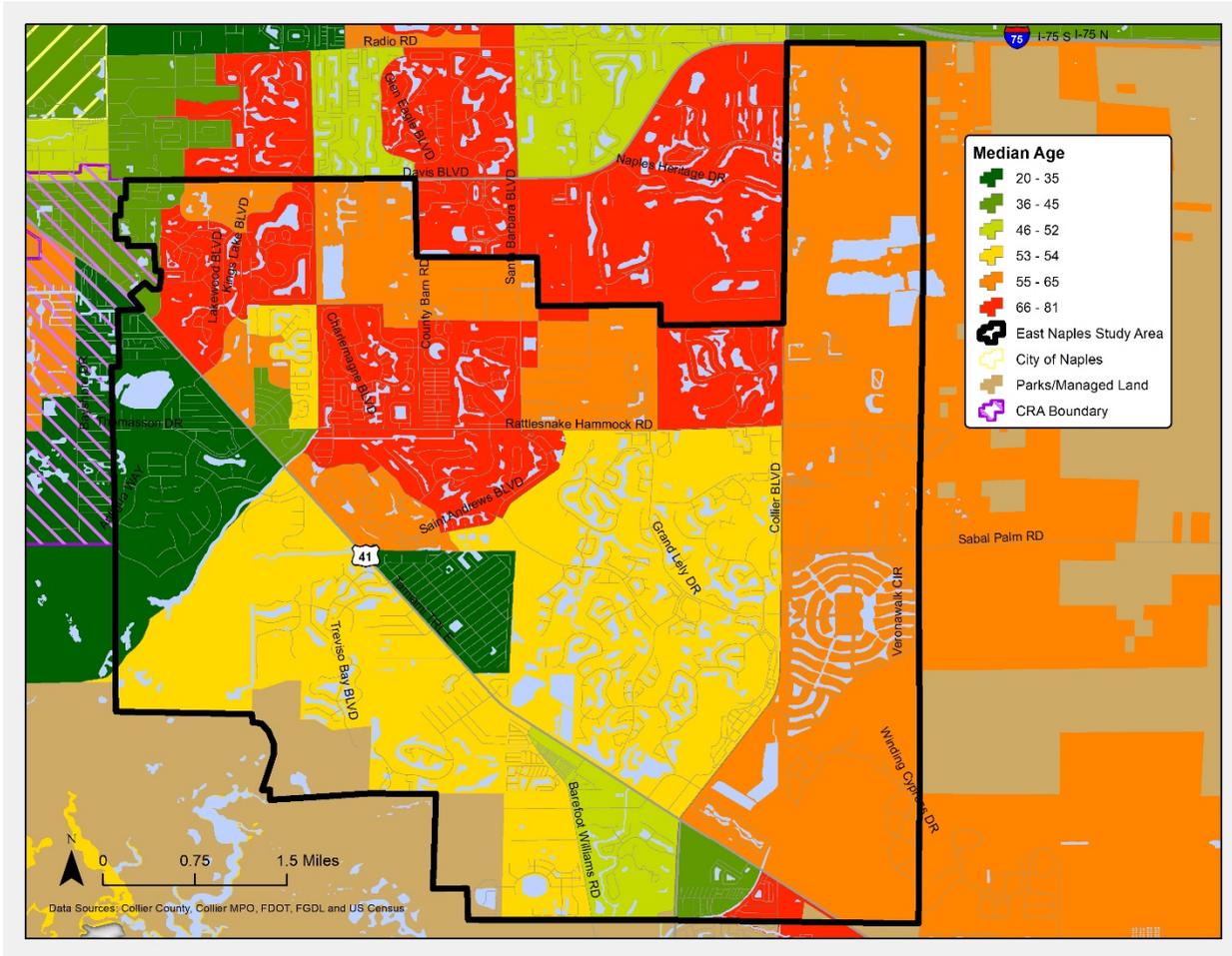


Source: American Community Survey 2018 5-Year Estimates

Age

Map 7 illustrates that there is a range of median ages (a middle measure of ages in an area, indicating a typical age) by census block group in and around the Study Area. The community includes working-age residents that may have children at home still, as well as retirement-age residents.

Map 7: Median Age by Census Block Group in and around Study Area



Source: American Community Survey 2018 5-Year Estimates

5.0 Land Use and Market Analysis

General Overview

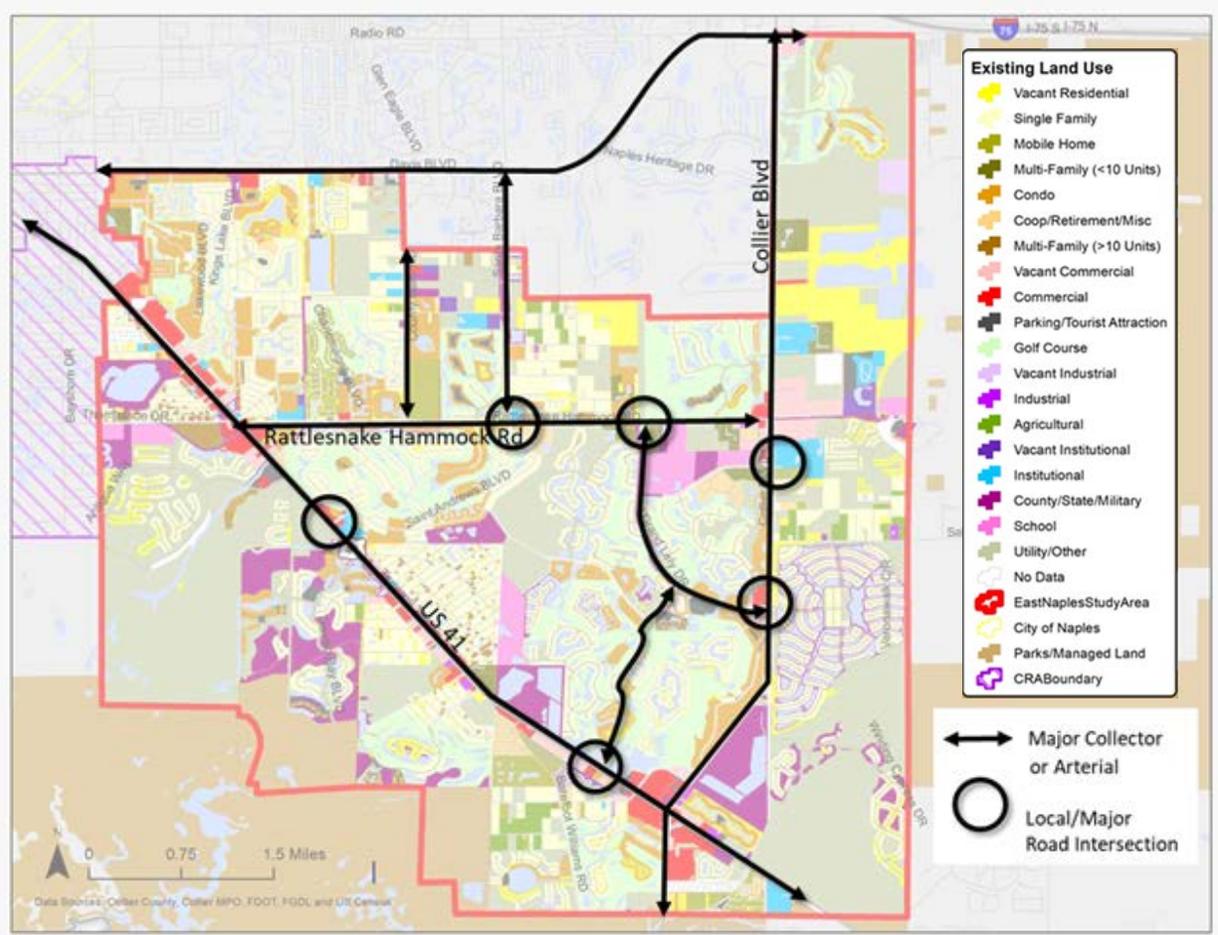
A general review of land uses in the area (Map 8 and Table 2) indicates that vacant land in general in the Study Area is limited, at only 6% of overall Study Area acreage. This finding suggests that the area is primarily in a redevelopment mode as opposed to a mode where new development is going in on vacant lots.

The configuration of land uses with roadways is also critical to highlight, particularly when analyzing existing commercial uses and considering approaches to increase desirable commercial uses in the Study Area. As Map 8 and Table 2 show, the existing amount of vacant and existing commercial that serve as a starting point for development and redevelopment opportunities is limited at 11% (2% for vacant commercial, 9% for existing commercial), if specialized uses such as golf courses, tourism sites, and parking lots/mobile homes lots are included; however, some of these specialized sites may have more involved considerations for redevelopment (consequently, we have not included them in our more detailed opportunity analysis later in this section). Much of the land in the Study Area is used for residential and utilities (a combined 66% of the total acreage); utilities is used here in the context of map designations to indicate utility and other general right-of-way, groundwater recharge areas, extraction areas (where applicable), and other similar uses (not necessarily public).

Additionally, the Study Area lacks a grid pattern roadway network, limiting access between residential neighborhoods at the center of the Study Area and the major roadways, as shown on Map 8. East/west through travel is limited to Davis Boulevard and Rattlesnake Hammock Road, with US 41 cutting diagonally. North/south through travel can mainly use Collier Boulevard as the direct route (again there is also US 41 cutting diagonally); many of the major collectors providing north/south travel do not continue through the entirety of the Study Area. Additionally, there are only six intersections between local and major roads.

This land use and roadway configuration could ultimately be a limiting factor for certain project aims such as attracting additional desired commercial uses since commercial thoroughfares are lacking in the heart of the Study Area, yet later stages of this project will evaluate opportunities for improving access between neighborhoods and existing commercial corridors for multiple transportation modes including walking and biking.

Map 8: Existing Land Uses and Roadways in Study Area



Source: Florida Department of Revenue, 2019 with some exceptions to reflect more recent conditions. Calculations based on existing land uses for this report rely on non-adjusted designations in the Florida Department of Revenue database.

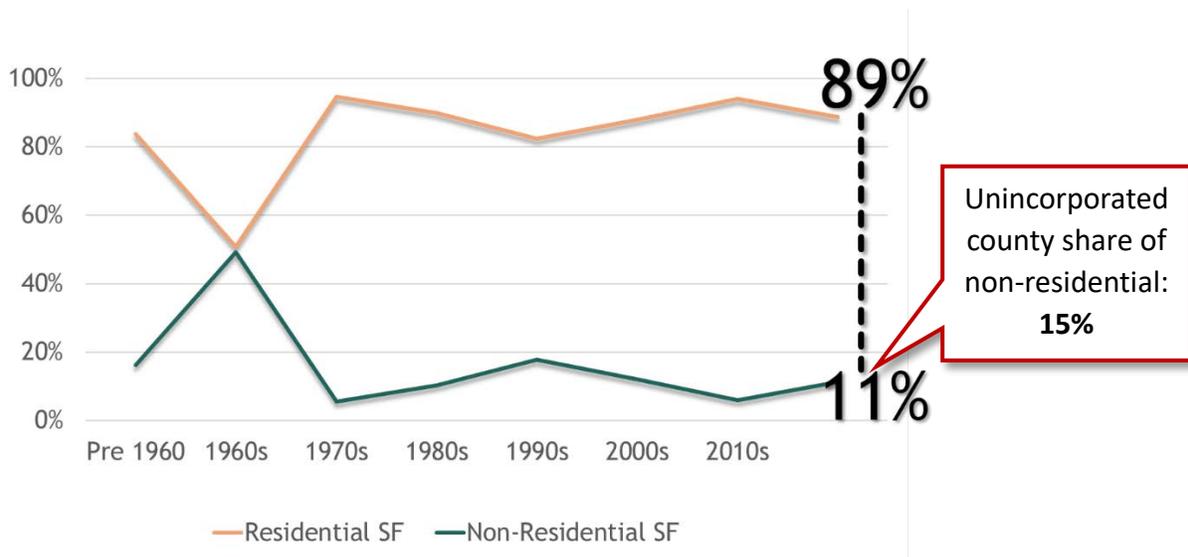
Table 2: Existing Land Use Acreage and Share of Acreage in Study Area

Existing Land Use	Acres	% of Study Area
Vacant	421	6%
-Residential	187	3%
-Commercial	175	2%
-Industrial	42	1%
-Institutional	16	0%
Single Family Residential	2,851	39%
Multi-Family Residential	92	1%
Mobile Home	184	3%
Commercial	362	5%
Industrial	266	4%
Institutional	47	1%
Agricultural	149	2%
County	649	9%
State	50	1%
Utility/Other	1,691	23%
Public Schools	142	2%
Colleges	80	1%
Golf Courses	250	3%
Tourist Attraction	78	1%
Parking Lot	11	0%
Total	7,351	-

Source: Florida Department of Revenue, 2019; note: total acreage may differ slightly from sum of individual use acreages due to rounding.

The predominance of residential uses over other uses is not unique to the Study Area, but also characterizes the county as a whole. The amount of square footage built by decade (Figure 1) illustrates this point; additionally, the shares of residential and non-residential in East Naples are currently 89%/11% respectively. These shares are currently 85%/15% in the unincorporated county, which was used for comparison since it is made up of areas in the county most similar to the Study Area. These numbers suggest that the predominance of residential may be more severe in East Naples than other similar parts of the county.

Figure 1: Residential and Non-Residential Share of Square Footage Built by Decade in East Naples



Source: Florida Department of Revenue, 2019

The following sections talk about residential trends and commercial trends in more depth, with the section on commercial exploring in more detail the relative lack of non-residential square footage and ways to address this issue.

Residential

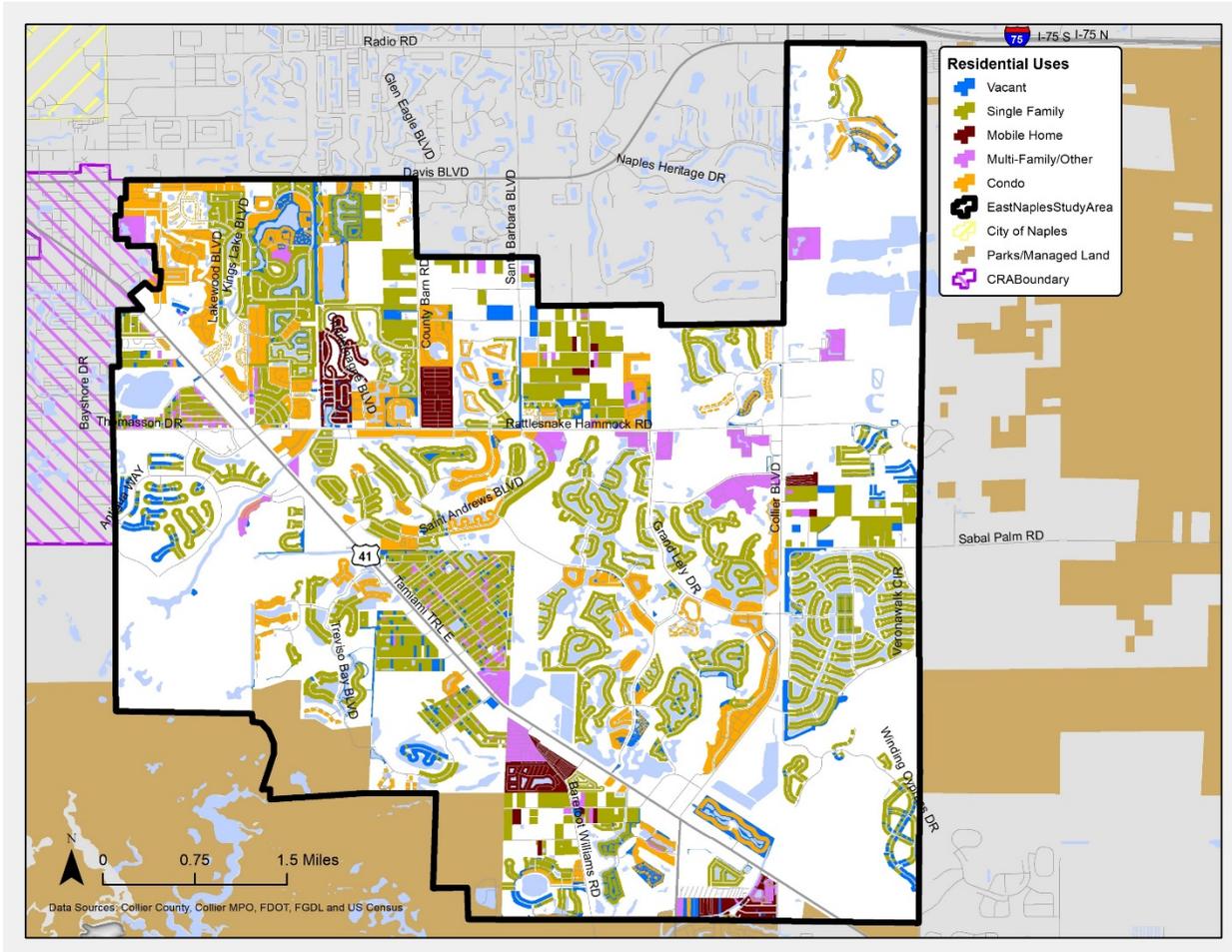
The land use analysis reviewed several factors of residential uses, including housing types, values, age and redevelopment, and affordability; findings are detailed by each of these topics in the remainder of this section.

Housing Types

Map 9 shows the location of different housing types in the Study Area; while single-family residential is widespread and takes up the greatest share of acreage as noted in the previous section, there are pockets of mobile homes, multi-family housing, condos, and other housing. When housing types are reviewed by square footage and number of housing units, multi-family residential, including condos, is the dominant type, with a total of 34.6 million square feet built from before the 1960's through the 2010's (compared to 28.5 million square feet of single-family residential) and over 18,000 units built during the same time period (compared to 11,406

units of single-family residential). As a result, this area is not unfamiliar with housing types that are typically denser than the standard single-family home, even if it is generally a low-density area as noted in Section 4.0.

Map 9: Location of Housing Types in East Naples



Source: Florida Department of Revenue, 2019

Table 3: Residential Square Footage Built by Decade and Housing Type

Decade	Single-Family	Multi-Family	Condominium	Mobile Homes
Pre 1960	116,979	8,429	N/A	N/A
1960s	263,324	52,641	N/A	93,356
1970s	2,186,013	3,047,442	N/A	394,029
1980s	3,590,598	4,872,235	20,408	304,406
1990s	3,934,337	5,963,871	2,202,570	148,504
2000s	10,137,697	6,460,394	2,517,865	111,412
2010s	8,270,704	5,389,127	4,051,440	67,592
Total	28,499,652	25,794,139	8,792,283	1,119,299

Source: Florida Department of Revenue, 2019

Table 4: Residential Units Built by Decade and Housing Type

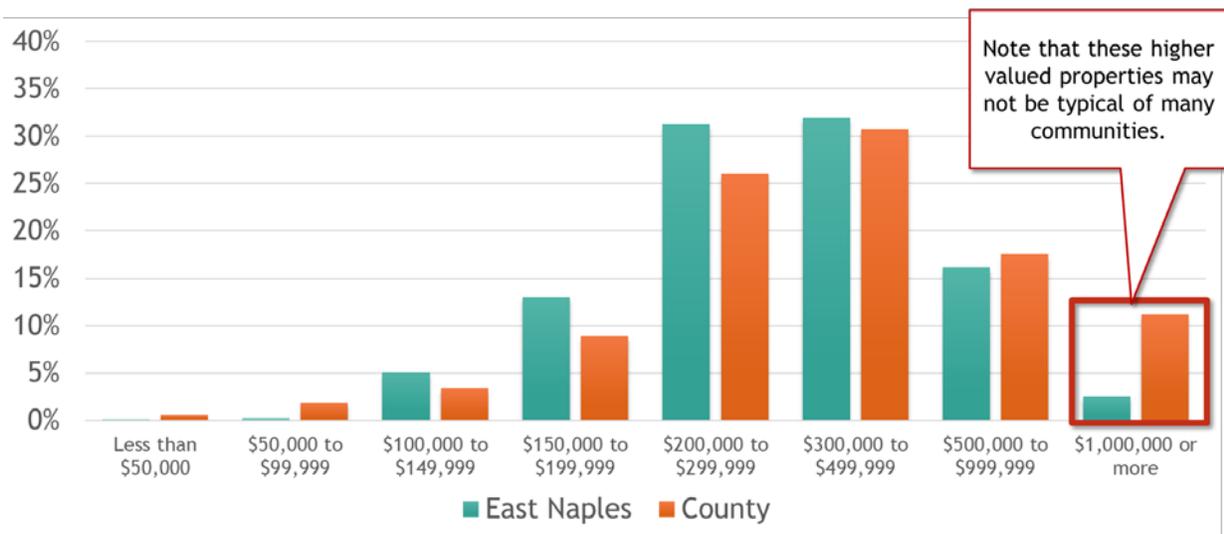
Decade	Single Family	Condo	Large Multi-Family (10+)	Small Multi-Family (1-9)	Mobile Homes
Pre 1960	78	174	N/A	8	N/A
1960s	165	11	N/A	57	125
1970s	1,087	2,225	N/A	482	387
1980s	1,567	3,950	9	85	253
1990s	1,712	3,832	690	34	99
2000s	3,950	3,934	542	15	74
2010s	2,847	1,593	654	3	50
Total	11,406	15,719	1,895	684	988

Source: Florida Department of Revenue, 2019

Housing Values

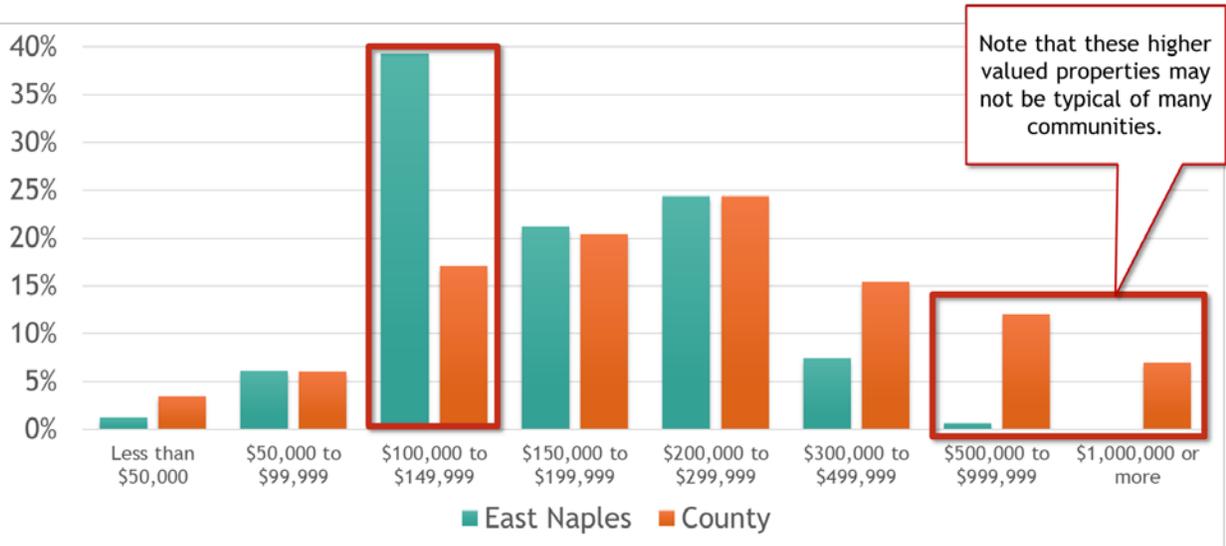
“Just value” provides an estimated value of residences based on property appraiser data (note that this estimated value is typically lower than what the current sales price would be). Figures 2 and 3 show just value for single-family homes and condos in the Study Area Compared to the county as a whole. The figures show that single-family home values are like those countywide, with the exception that East Naples lacks as much housing at the extremes of the values (very low and very high). 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. In terms of condos, East Naples values are similar to the county’s, except that East Naples lacks extremely high value condos and has a much higher share of condos in the \$100,000 to \$150,000.

Figure 2: Just Values of Single-Family Homes



Source: Florida Department of Revenue, 2019

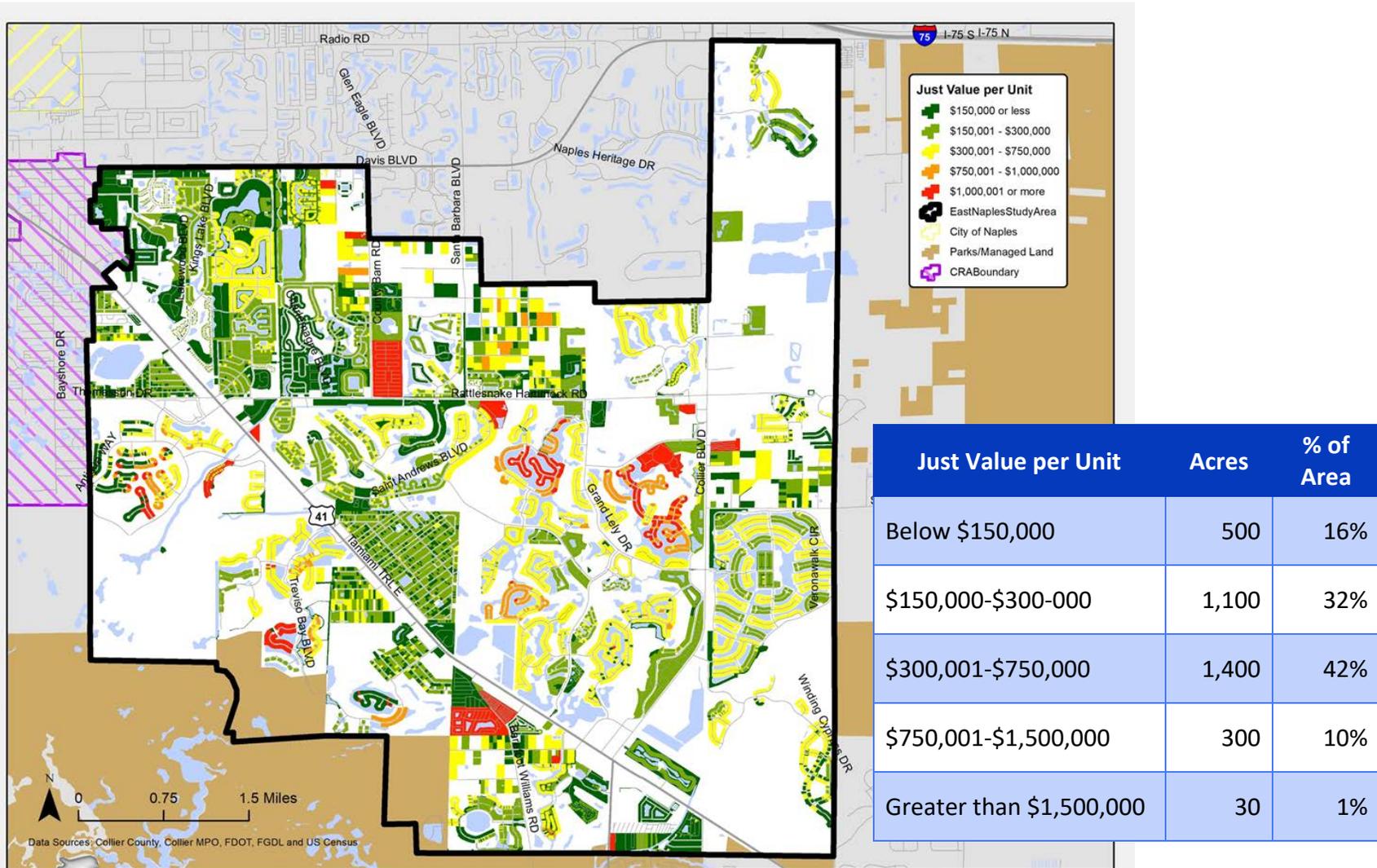
Figure 3: Just Values of Condos



Source: Florida Department of Revenue, 2019

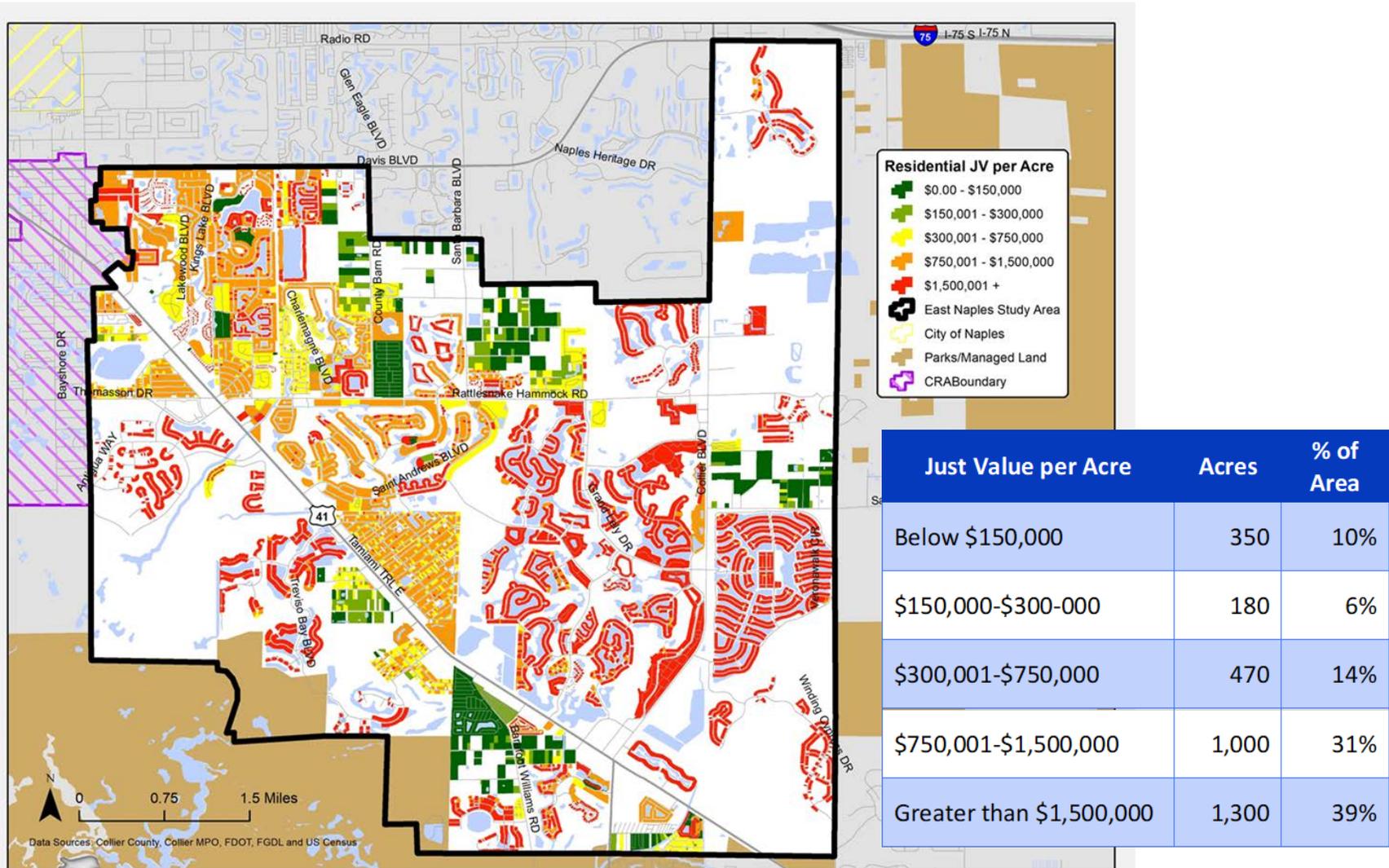
The discussion of density is also important in terms of tax base and taxable values in an area. Areas that may have lower just values on a per unit basis (Map 10) may still have a strong just value per acre measure (Map 11), which is likely due to greater relative densities in these areas. The opposite can be true where higher per unit value can relate to lower per acre value, likely due to lower densities in an area.

Map 10: Residential Just Value per Housing Unit in East Naples



Source: Florida Department of Revenue, 2019; note: this map is for general illustrative purposes. Some areas are mobile home parks where the entire development site is recorded as a unit within the database as opposed to individual mobile home units within the site, which may inflate just value per unit.

Map 11: Residential Just Value per Acre in East Naples

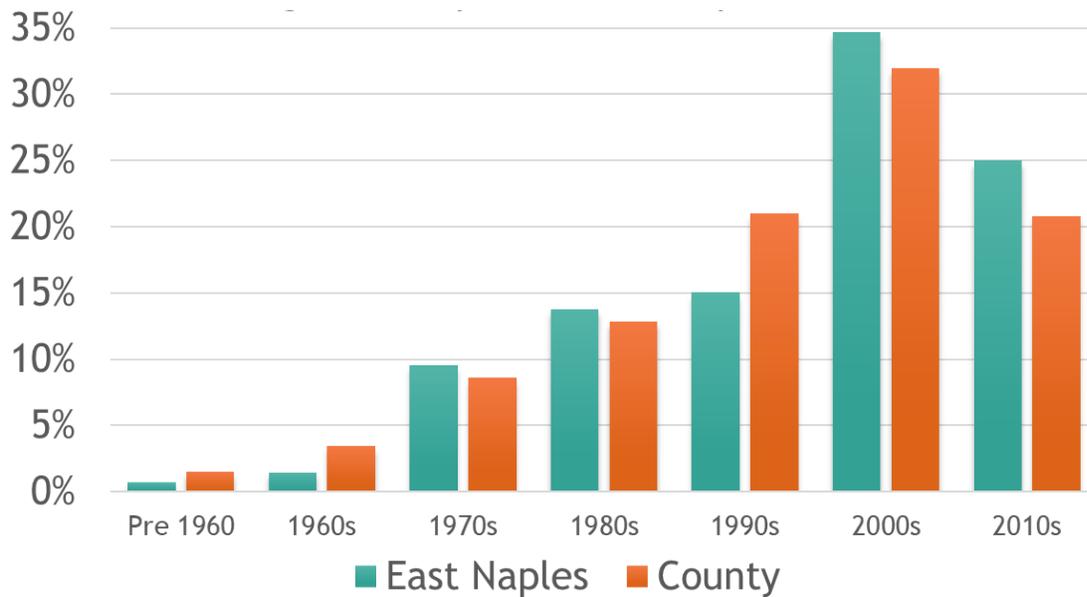


Source: Florida Department of Revenue, 2019

Housing Age and Redevelopment

Redevelopment can help maintain housing values and improve structural quality where needed. The age of housing in terms of when units were built or significantly renovated may provide an indication of structural quality and whether units are typically in a condition to be ready for redevelopment or not. Figure 4 shows when single-family homes were most recently built or significantly renovated; most units (60%) were built or updated in the 2000s or 2010s, so they are likely in good condition. However, there is still a sizable share from the 1990s or previous decades that are approaching an age where redevelopment may be needed or that have already aged to that point.

Figure 4: Share of Single-Family Homes Built or Significantly Renovated by Decade



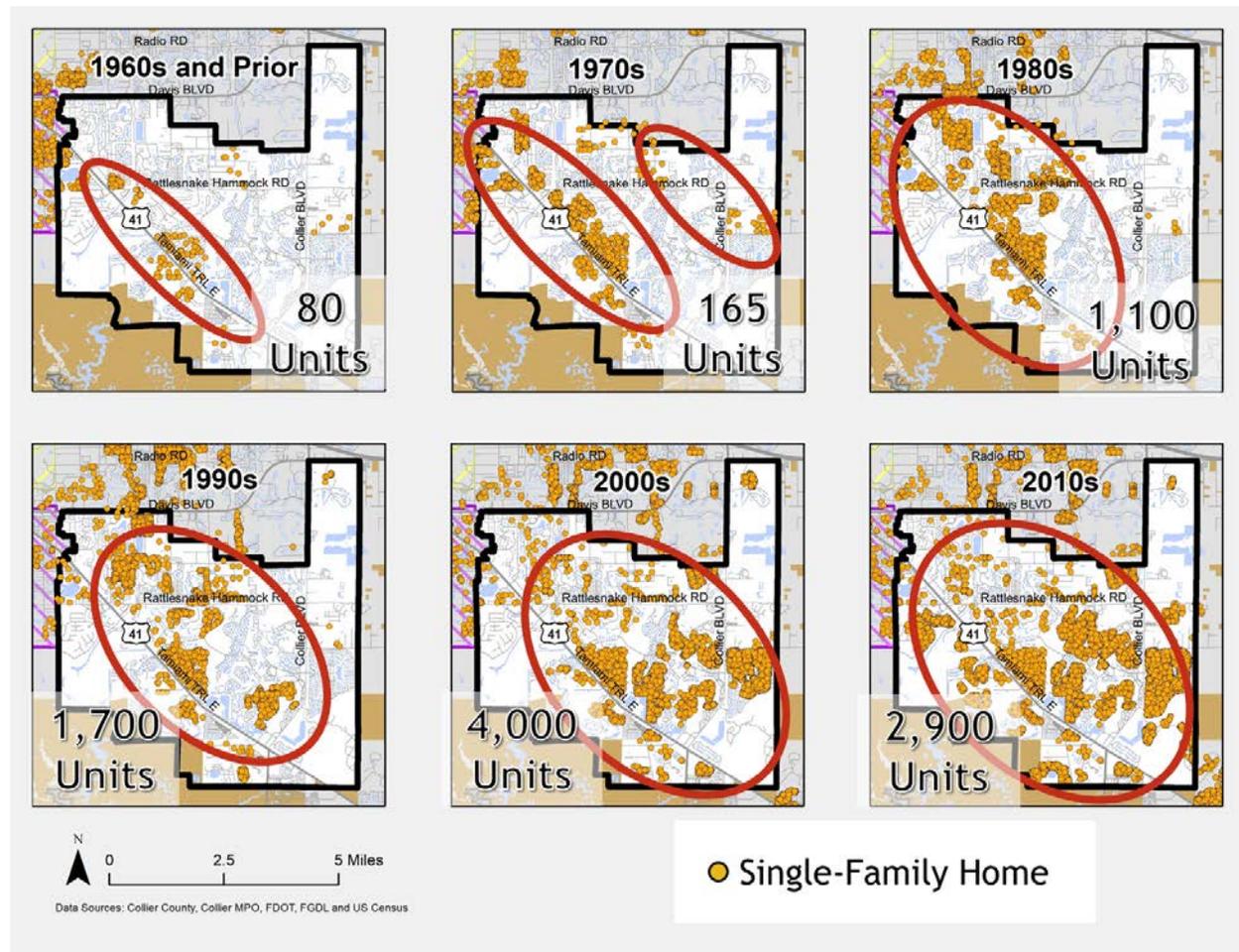
Year Built or Significantly Renovated	Units	Per Year
Pre 1960	80	N/A
1960s	165	17
1970s	1,100	110
1980s	1,600	160
1990s	1,700	170
2000s	4,000	400
2010s	2,900	290
Total	11,545	-

60% of single-family homes were built in the 2000's and 2010's.

Source: Florida Department of Revenue, 2019

Figure 5 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 redevelopment to improve structural quality in those areas. Newer units are also located in these areas, but also are significantly located in the eastern portion of the study area.

Figure 5: Location of Single-Family Homes Built or Significantly Renovated by Decade



Source: Florida Department of Revenue, 2019

Housing Affordability

Housing burden is a measure that provides a snapshot of current affordability conditions in an area, for both rental and owner-occupied units. A household is typically considered burdened if it is paying 30% or more of its income on housing and is typically considered extremely burdened if paying 50% or more of income on housing. Additional considerations to keep in mind when thinking about this measure is the absolute numbers of renters or homeowners in an area (which can indicate number of people affected by rental or mortgage burden), as well as absolute income levels. A household that is paying 30% of income on housing but making \$1

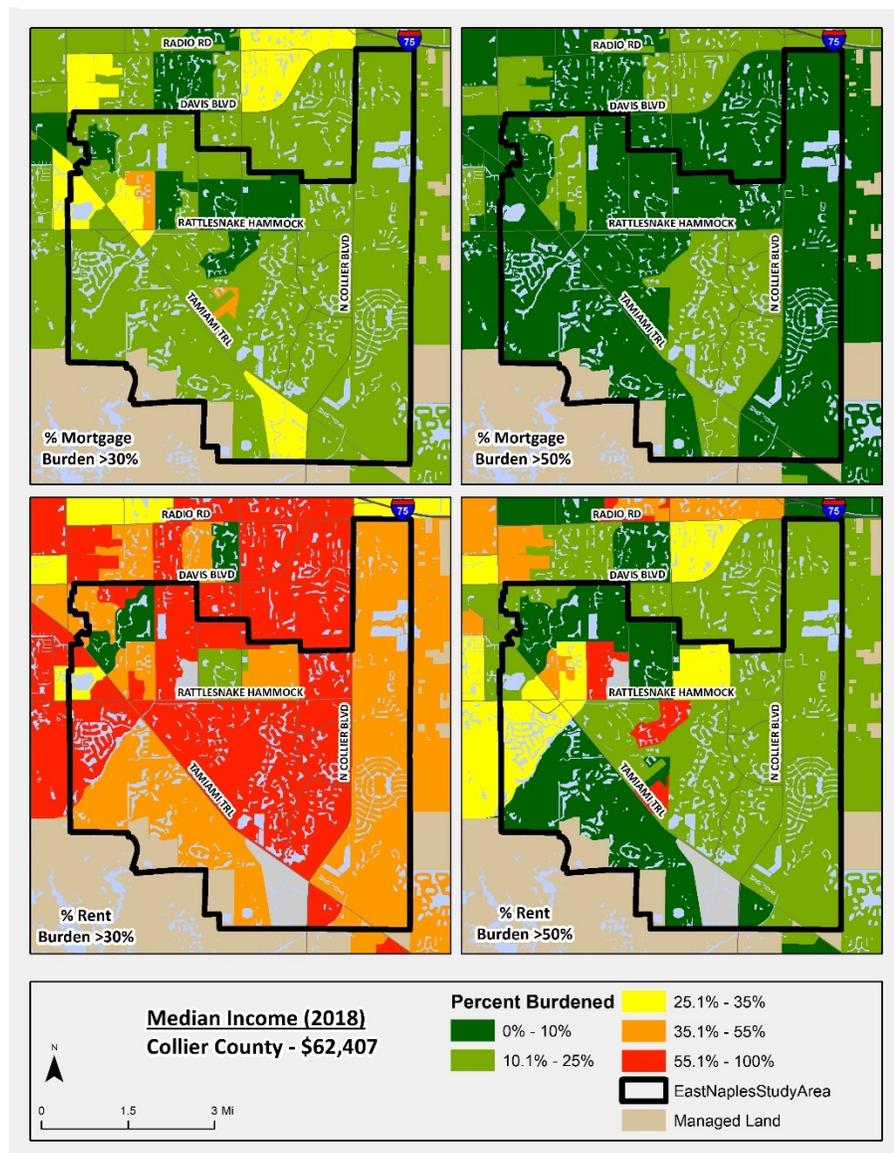
million of annual income is in a better position to pay for other living expenses than a household paying 30% of income on housing and only making \$30,000 in annual income.

Map 12 shows the share of existing households in the community experiencing rental and housing burden, both at the 30% measure and 50% measure, by census block of the Study Area. Traditional multi-family housing units that are typically rental make up about 6% of the housing units in the Study Area, as noted earlier; Map 12 indicates that rental burden tends to be more extreme (higher shares of households experiencing burden at the 30% and 50% thresholds) than mortgage burden in the Study Area. However, sizable shares of owner-occupied households (10-25%) are still experiencing mortgage burden, an occurrence widespread throughout the Study Area at the 30% burden threshold. These findings suggest a need for more affordable options for households in the community, particularly for rental units and households falling below the median income.

One factor changing dramatically over the years and that may influence housing affordability is housing size. Figure 6 shows how the median square footage for a single-family home has steadily increased since the time prior to the 1960's, roughly doubling in size. This finding may signal intensified housing affordability issues if housing prices increase due to size increases.

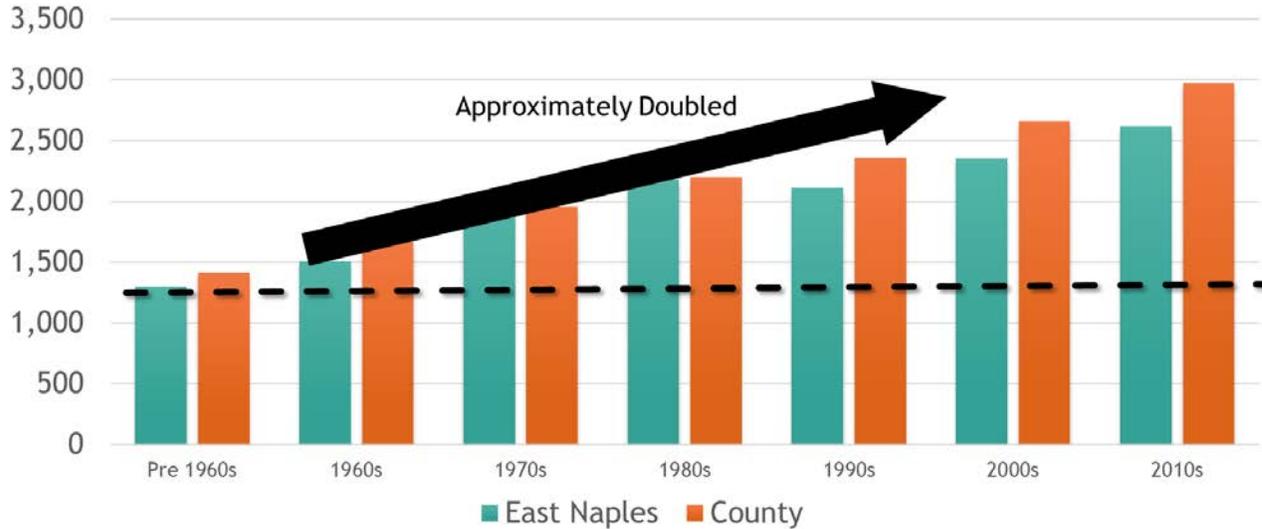
Figure 6 shows how the median square footage for a single-family home has steadily increased since the time prior to the 1960's, roughly doubling in size. This finding may signal intensified housing affordability issues if housing prices increase due to size increases.

Map 12: Housing Burden



Source: American Community Survey 2018 5-Year Estimates

Figure 6: Median Square Footage of a Single-Family Home in East Naples by Decade



Source: Florida Department of Revenue, 2019

Commercial

As noted in Section 3.0, participants in the 2018 US 41 Corridor Study wanted to encourage more of certain desirable commercial uses along the corridor, including shopping and retail, mixed-use and live/work development, restaurants, grocery stores and wholesale clubs, and hotels and resorts. As noted in the beginning of this section, the Study Area appears to be underserved by non-residential development in general. As a result, the following analysis focuses on the amount of desirable uses already in the Study Area, reasonable benchmarks to gauge and increase the amount of desirable uses, and approaches for how to move towards those benchmarks.

Existing Amount and Location of Desirable Commercial Uses

As noted earlier in this section, the amount of commercial in general in the study is limited to about 9% of the total Study Area. Figure 7 shows the land use categories that capture desired uses noted in the 2018 US 41 Corridor Study. One-story retail or shopping centers make up most of the desirable commercial categories in the area. Note that some development types may be measured in different categories; for instance, restaurants may be captured in the shopping center category, the mixed-use category, or the restaurant category. Map 13 shows where these categories are in the Study Area, mainly along US 41.

There are certain additional developments just outside the Study Area that capture certain desirable uses. These developments are in the Community Redevelopment Area (CRA) located to the west of the Study Area and shown on Map 13. Other developments are located further south along Collier Boulevard and to the north near the Interstate 75 interchange at the intersection with Collier Boulevard.

Figure 7: Existing Land Use Categories Capturing Desired Commercial Uses

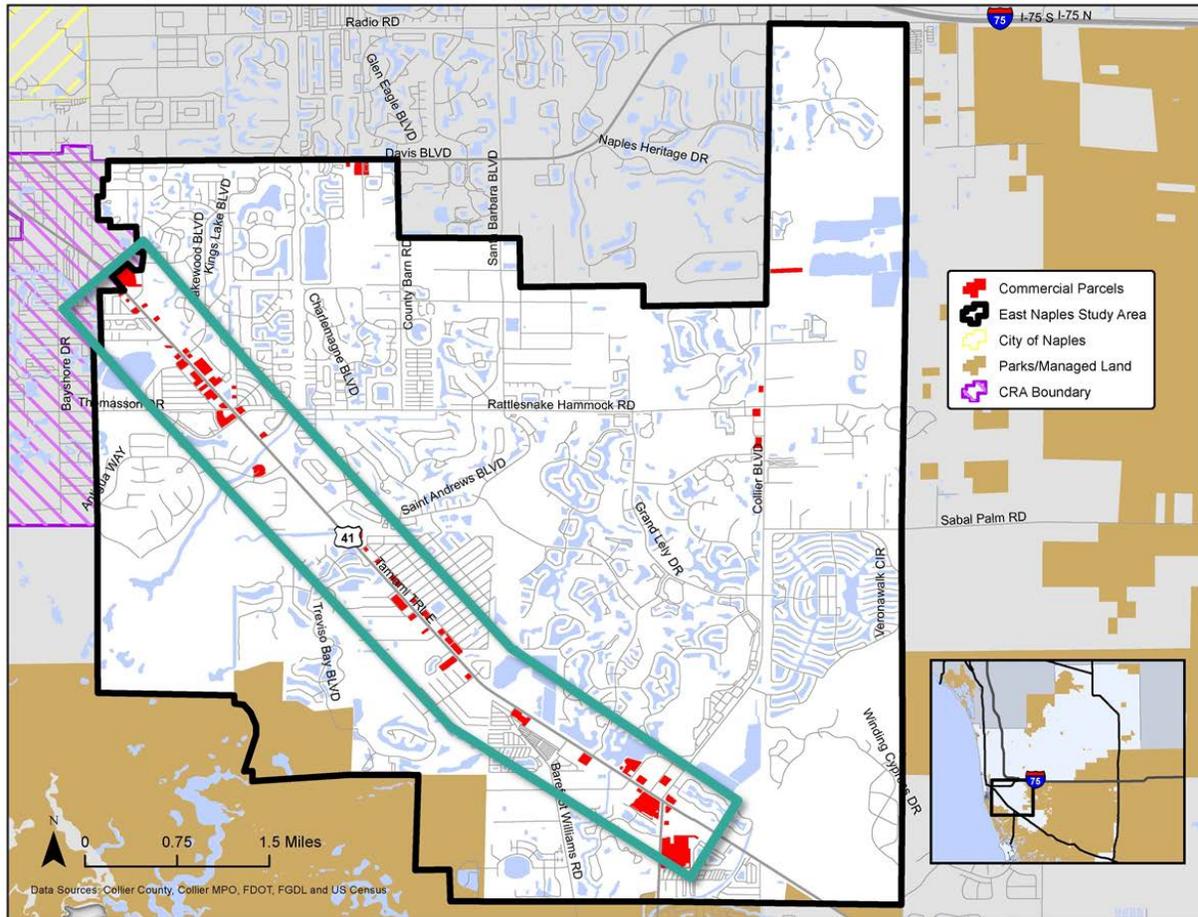
There are **374 acres** of total commercial, **9%** of the total project area.

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%

*Note that measures for some development types, such as restaurants, may be captured in different categories (such as “shopping center”, “Mixed Use,” or “restaurants”).



Map 13: Location of Existing Desired Commercial Categories



Source: Florida Department of Revenue, 2019

Commercial Benchmarks

The beginning of this section noted that the share of total square footage that is non-residential, which would include square footage of desired commercial uses, is currently 11% in the Study Area this compares to a 15% share in the unincorporated county as a whole, which represents areas thought to be most similar to the Study Area in Collier County. In view of this difference, the project team began to analyze how the Study Area might move towards closing this gap, with a focus on increasing desirable commercial uses.

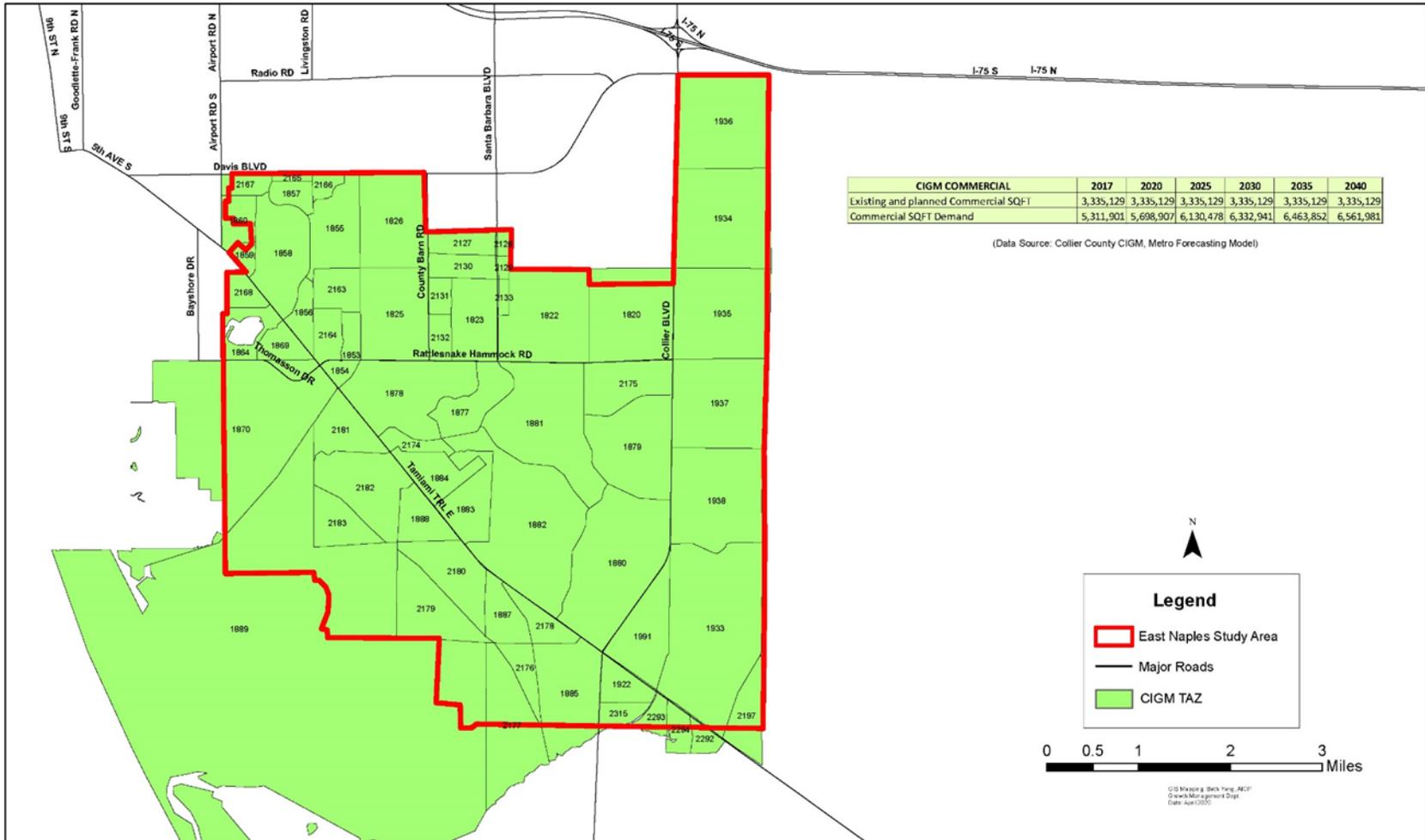
In thinking about benchmarks for these increases, it is important to keep in mind some of the constraints noted in the previous sections of this memorandum. The lower population density and high estimated share of seasonal population (60% of residential units estimated to house seasonal residents) may make it difficult to attract additional commercial uses to the area (Section 4.0). Additionally, the current land use and roadway configuration may limit the areas where new commercial may locate and how accessible the businesses are by neighborhoods (Map 8).

However, if the population growth estimated by the CIGM (Map 5) for the area in coming years occurs and is accommodated, it could lead to increased density in the area. The possibility of this outcome depends in part on land use regulations and incentives implemented by the County, discussed further at the end of this section. The CIGM also estimates the commercial square footage and demand for square footage for the area, shown in Map 14. The amount of existing and planned commercial square footage is estimated at more than 3.3 million square feet and remaining steady over time, while the demand is estimated to increase to nearly 6.6 million square feet by 2040. As a result, it is estimated that the demand for commercial square footage may outpace what exists and is planned in the coming years.

In addition to reviewing these estimates for commercial demand in the long-term, the project team also looked at a more immediate, on-the-ground gauge of market demand for the existing commercial spaces in the Study Area by looking at current vacancies of these spaces. A high-level review of existing commercial leasing opportunities in the area from listings on the internet service LoopNet provides an approximate vacancy rate of 7%, based on listing as of April 15, 2020. This suggests that there are existing commercial opportunities not currently being filled by the market, many of which are spread along US 41 (Map 15). The County is limited in its control over the private market, yet it can work to influence the market through regulations and incentives, discussed later in this section.

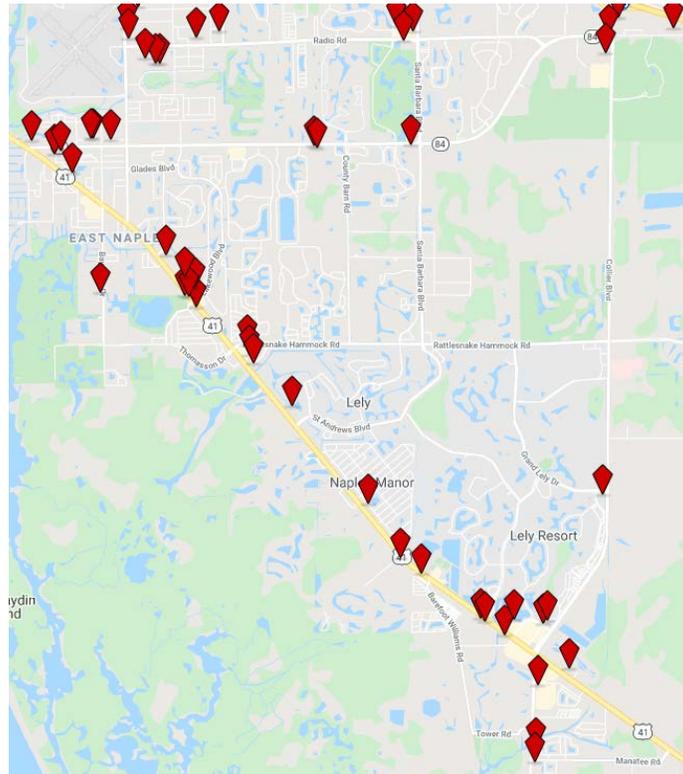
Map 14: East Naples Commercial Square Footage and Demand Estimates through 2040

**COMMERCIAL ANALYSIS FOR EAST NAPLES STUDY AREA
USING COLLIER INTERACTIVE GROWTH MODEL
(COMMERCIAL DEMAND)**



Source: Collier Interactive Growth Model

Map 15: Location of Commercial Leasing Opportunities in the Study area



Source: Commercial leasing opportunities posted on LoopNet.com as of April 15, 2020

In view of these considerations, reaching a full increase to a 15% share of non-residential square footage may pose a challenge; yet even getting partway to 15%, such as 12-13%, is a potential target, particularly if the increases are mainly from increased desirable commercial uses. Table 5 shows the amount of additional commercial square footage and corresponding acreage needed to reach 12% to 15% shares of non-residential square footage relative to the overall square footage. The acreage is based on typical square footage built per acre for these uses in the unincorporated county. These estimates assume the current amount of residential square footage and that existing vacancies in built commercial structures would be filled. Estimates range up to 3.4 million square feet or 270 acres of commercial uses for the 15% benchmark.

Table 5: Commercial Square Footage and Acreage Increases Needed by Benchmark of Residential and Non-Residential Shares of Square Footage

Residential Benchmark	Non-Residential 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

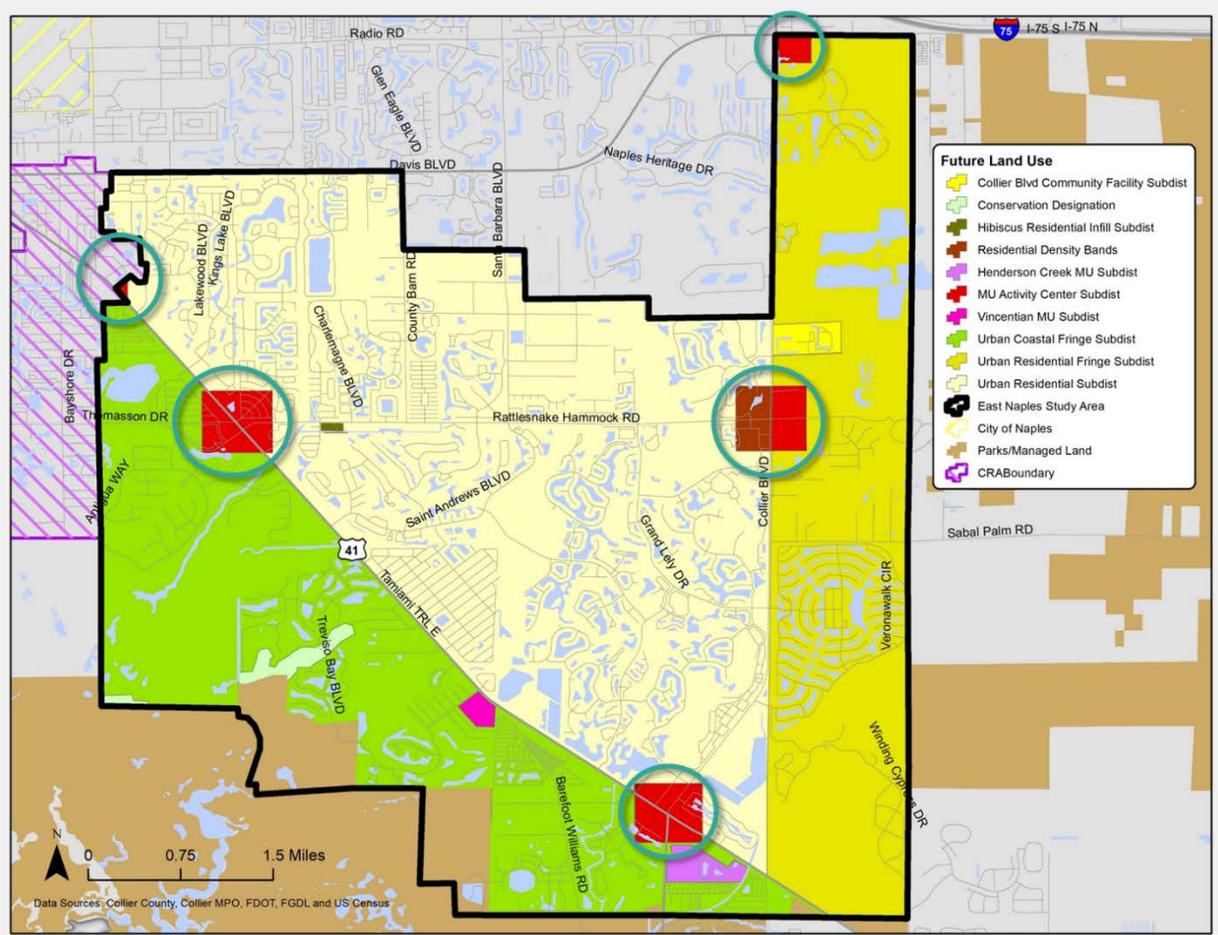
Source: calculations based on Florida Department of Revenue 2019 data; note: these numbers assume the current level of residential square footage and square footage/acreage added in addition to filling vacancies in existing commercial buildings.

The remainder of this section will explore approaches for progressing towards these benchmarks.

Commercial Development and Redevelopment Opportunities

The following analysis focuses on likely locations for new desired commercial uses. To begin with, Activity Centers (Map 16) 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. They cover 530 acres, or about 3%, of the Study Area. The project team then looked at on-the-ground development patterns to understand how the current development landscape and potential future opportunities compared to these target areas.

Map 16: Future Land Uses in East Naples, including Mixed-Use Activity Centers



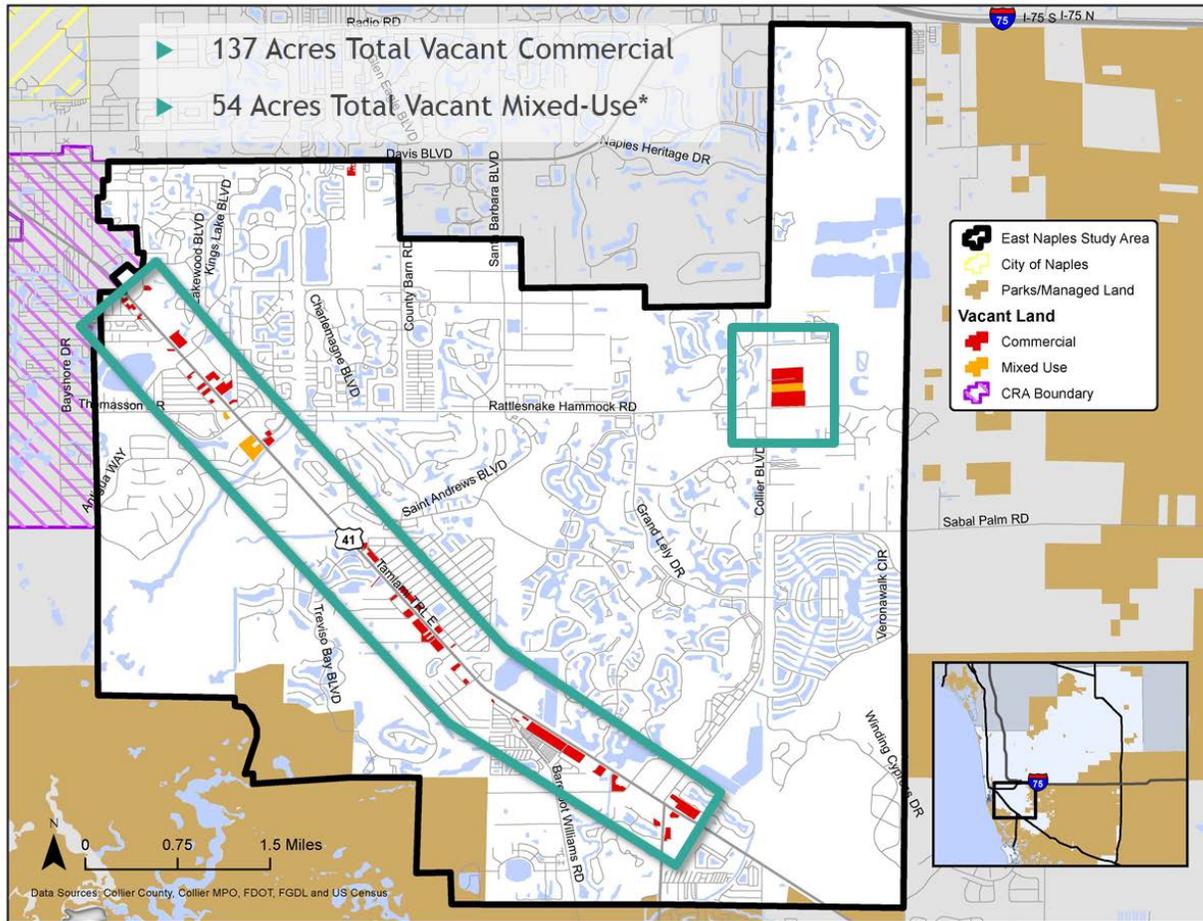
Source: Collier County

Aside from filling vacancies in existing commercial buildings as discussed previously in this section, the most straightforward areas to encourage new business and commercial uses are vacant commercial and mixed-use lots; they are already zoned for desired uses and do not have existing buildings. Map 17 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. There is a total of approximately 137 acres of vacant commercial lots and 54 acres among vacant mixed-use lots with potential for commercial development; note that the Hacienda Lakes mixed-use site in the northeast section of the Study Area is vacant based on property appraiser data, yet it is likely to be developed without commercial uses so it is excluded from Map 17 and the acreage count. While there is sizable vacant mixed-use acreage, typically only 10% of mixed-use land is used for commercial, based on an analysis of how these parcels are typically developed in the 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.

Map 17: Vacant Commercial and Mixed-Use Lots with Potential for Commercial Development



Source: Florida Department of Revenue, 2019; *note: does not include large mixed-use Hacienda Lakes parcel; typically less than 10% of mixed-use land is built out for commercial, based on an analysis of how these types of lots are typically developed in unincorporated county.

If the County could employ a strategy to influence the private market and achieve a full build-out of vacant commercial land and a more moderate build-out of vacant mixed-use land for commercial (based on the typical 10% build-out in unincorporated county), the Study Area could achieve the 12% non-residential square footage benchmark (Table 6). Existing vacancies in built structures may make it harder to fully build out vacant lots; incentives and other strategies may help. Achieving the higher benchmarks would require additional intensity on vacant commercial/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.

Table 6: Build-Out Scenario with No Intensification of Commercial Uses

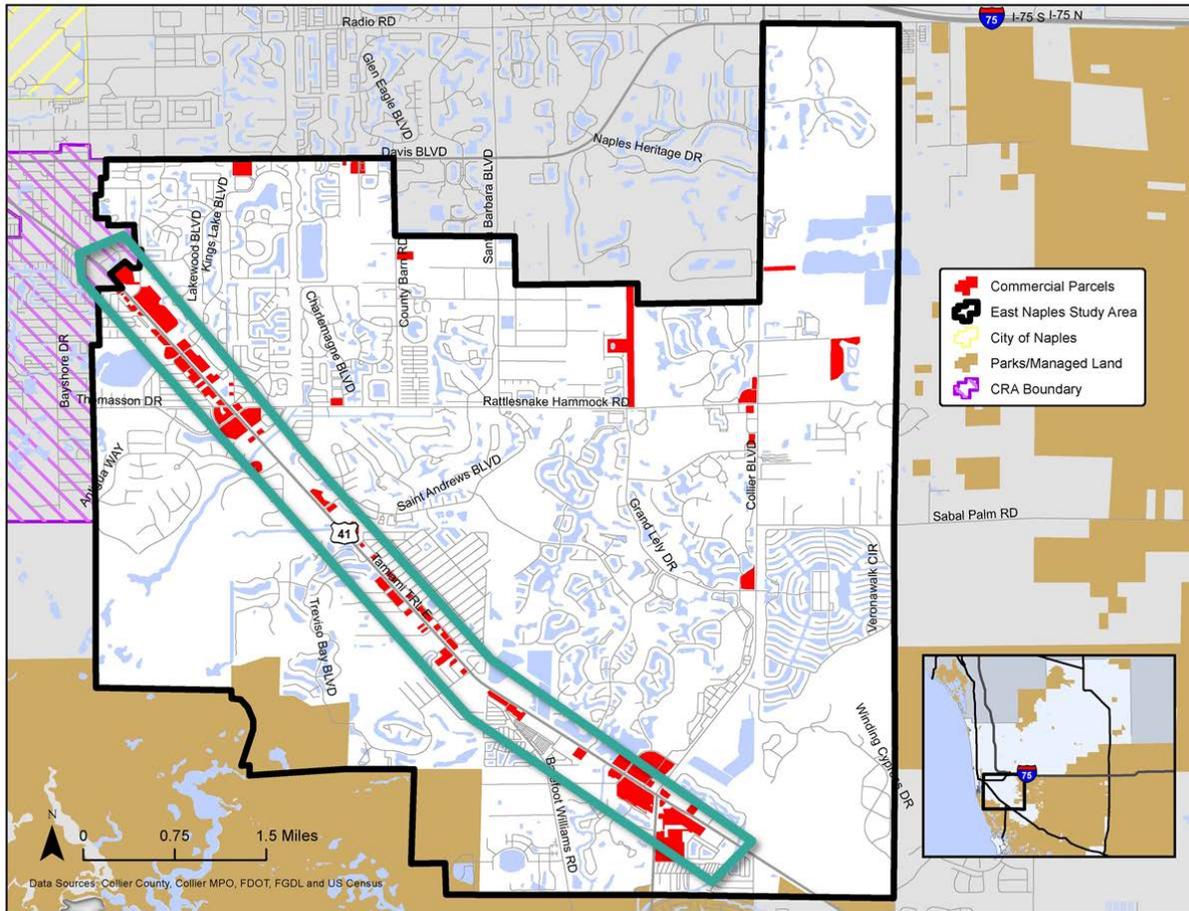
% Non-Residential Benchmark	Acreage Benchmark	Vacant Commercial Acres Used	Vacant Mixed-Use Acres Used	Remaining Acreage Needed
		If 137 used of 137 total	If 5 used of 54 Total	
12%	99	137	5	0
13%	157			15
14%	214			72
15%	270			128

Source: calculations based on Florida Department of Revenue 2019 data; note: vacant mixed-use acreage used in this scenario based on 10% commercial build-out typically seen on mixed-use lots in unincorporated county.

Aside from new development on vacant lots, existing development can be redeveloped to update structures and provide additional commercial opportunities. Commercial development, particularly that which is already zoned for desired uses, is the most straightforward (Map 18); note golf courses, tourism uses, and parking/mobile home lots are excluded since there may be special considerations when trying to redevelop these parcels. For the purposes of this section, these uses are referred to as “specialized commercial uses.”

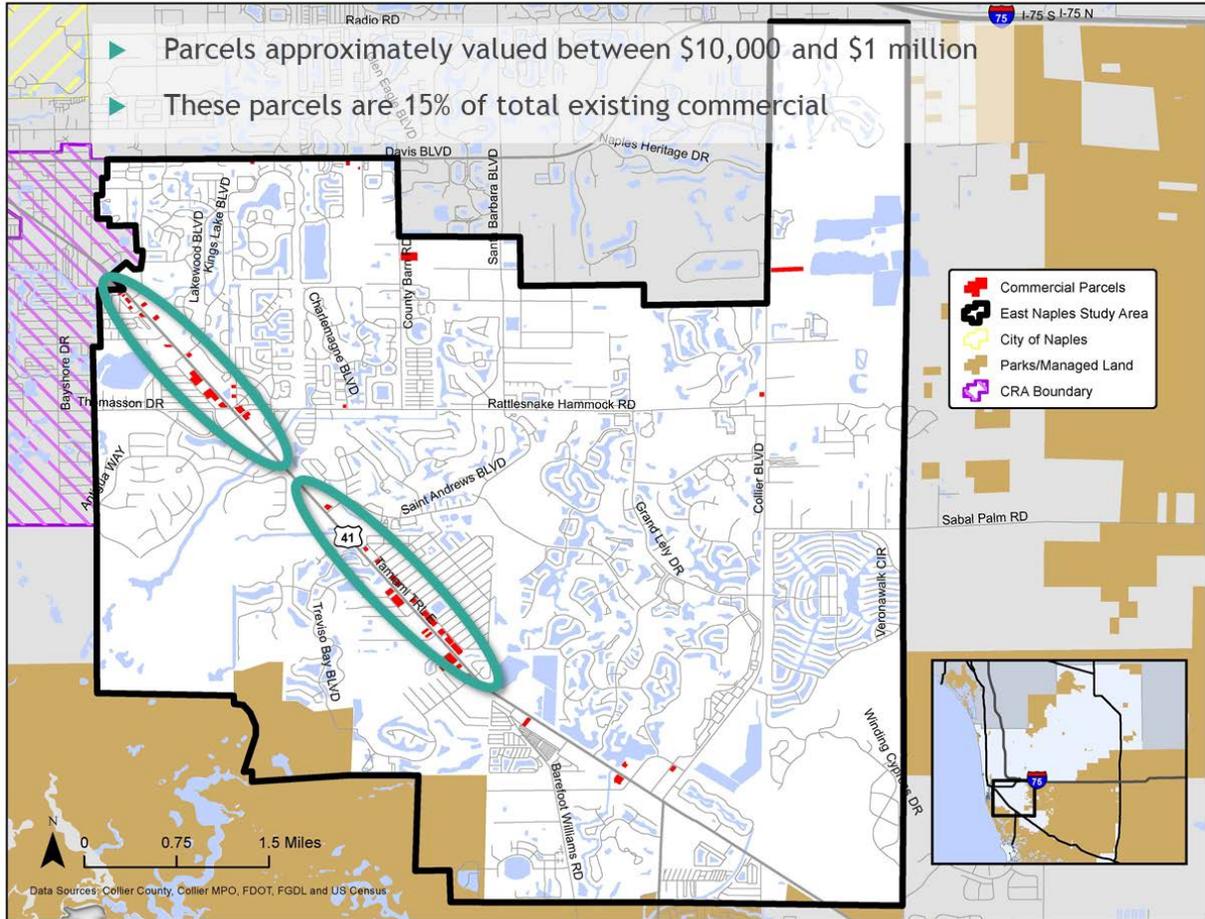
The project team attempted to identify more likely redevelopment opportunities among these commercial uses based on value and size of the parcel; less costly and larger parcels are easier to redevelop. Map 19 shows non-specialized existing commercial uses valued between \$10,000 and \$1 million that the project team considered more likely to redevelop since they are relatively less expensive (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. The project team also filtered these parcels based on those larger than an acre in size, resulting in 16 parcels with a total of 30 acres among them (Table 7).

Map 18: Existing Commercial, Excluding Specialized Uses



Source: Florida Department of Revenue, 2019; note: these commercial parcels do not include golf courses, tourism uses, or parking/mobile home lots since these uses may require special considerations when exploring the option to redevelop them.

Map 19: More Likely Redevelopment Areas for Desired Commercial Uses



Source: calculations based on Florida Department of Revenue 2019 just value data; note: these commercial parcels do not include golf courses, tourism uses, or parking/mobile home lots since these uses may require special considerations when exploring the option to redevelop them.

Table 7: Parcel Size, Count, and Acreage for Parcels Valued between \$10,000 and \$1 Million

Parcel Size	Count	Combined Acres	% of Total Acres
Large (10 or Larger Acres)	0	0	0%
Medium (3 to 9 Acres)	3	13	25%
Small (1 to 2 Acres)	13	17	32%
Very Small (<1 Acres)	53	22	42%
Total	69	53	100%

Source: calculations based on Florida Department of Revenue 2019 data; note: includes commercial parcels valued between \$10,000 and \$1 million in just value with desired commercial use categories and excludes golf courses, tourism uses, or parking/mobile home lots since these uses may require special considerations when exploring the option to redevelop them.

To get an increase in commercial uses, more intensity would need to be added to these sites. Certain existing commercial could also be redeveloped at the existing intensity with a focus on desired uses through incentives. Table 8 illustrates a scenario in which the County successfully engaged in more robust approaches to encourage additional commercial development, including additional intensity, on vacant land and commercial land identified as more likely to redevelop based on value and size as described in Table 7. If the County allowed and could successfully incentivize an additional 25% increase to existing intensity, the area could achieve additional commercial acreage needed to achieve the 13% benchmark. Note that the table does not account for existing commercial that may redevelop since it is gauging only added uses (and not those that are replaced); however, incentives could be used to encourage redevelopment of existing commercial uses towards more desired commercial uses at the same allowed intensity.

Table 8: Build-Out Scenario with Intensification of Commercial Land that is Vacant or More Likely to Redevelop

% Non-Residential Benchmark	Acreage Benchmark	Vacant Commercial Acres Used	Vacant Mixed-Use Acres Used	Additional Acreage: Commercial Land More Likely to Redevelop	Remaining Acreage Needed
		137 total used x 1.25 additional intensity	5 used of 54 Total	30 total acres x 0.25 additional intensity	
12%	99	137	5	7.5	0
13%	157				0
14%	214				31
15%	270				87

Source: calculations based on Florida Department of Revenue 2019 data; note: vacant mixed-use acreage used in this scenario based on 10% commercial build-out typically seen on mixed-use lots in unincorporated county.

Approaches for Influencing the Private Market

Given the potential development and redevelopment options, what tools are at the County’s disposal to influence the market to produce these outcomes? Some tools, such as a marketing campaign and regulatory/incentive adjustments within the existing parameters of 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 such as adjustments to lot depths on the corridor and an evaluation for increased allowed amounts of commercial intensity and incentives to achieve full allowed build-out. This approach can also be explored for residential uses in the area to allow and encourage more residential units and provide a larger local customer base for local commercial. The following provides an initial list of implementation options to explore further for recommendations, which may include regulatory changes to the Land Development Code and Growth Management Plan, incentives, funding tools, and capital/non-capital investments, in Technical Memorandum #2 of the plan:

- Marketing campaign for area
- Adjust regulations for site requirements
- Evaluate and adjust amount of commercial development allowed (this can be paired with incentives to encourage full build-out)
- Allow/encourage adjustments to commercial lot depths
- Evaluate and adjust amount of residential allowed to increase residential units and customer base for local businesses (this can be paired with incentives to encourage full build-out)
- Incentives, including but not limited to:
 - Design flexibility
 - Expedited permitting
 - Fee reductions/waivers

Tax increment finance funding was also mentioned in a stakeholder meeting with development representatives as a potential incentive to support development and redevelopment in the area. Note that this is already in place in nearby areas, such as the Bayshore/Gateway Triangle Community Redevelopment Area to the west of the Study Area and in the Innovation Zone to the northeast of the Study Area near the Interstate-75 interchange.

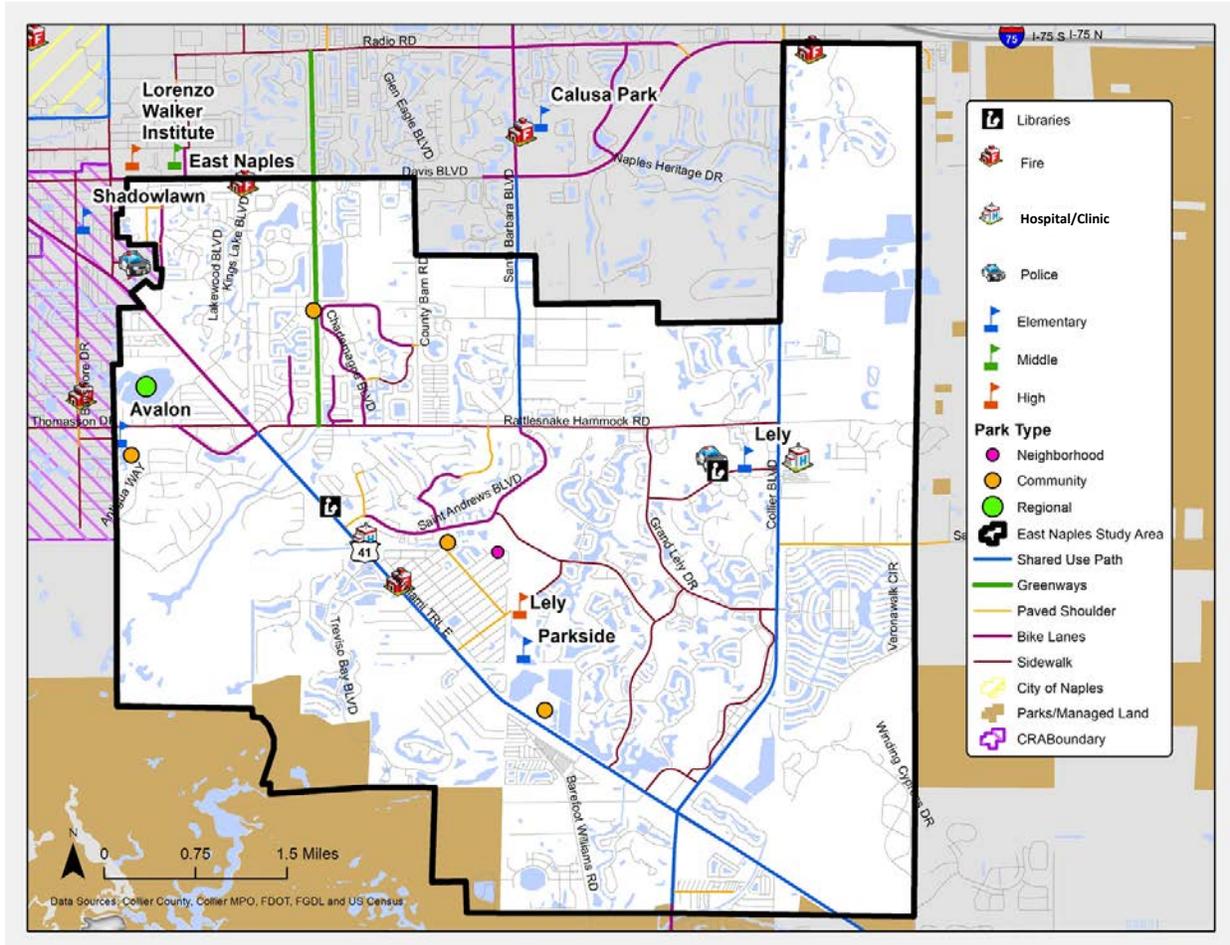
6.0 Community Assets

The project team documented community assets, including public facilities and services, in East Naples along with their performance levels and planned improvements to support community branding and marketing and identify facility/service provision considerations for future planning efforts. Information is based on spatial data files from the County, the Fiscal Year 2019 Annual Update and Inventory Report (AUIR), the Fiscal Year 2020 Capital Improvement Plan (CIP), and the most recent plans for specific topics (e.g., transportation, parks, schools, etc.).

The following summary includes maps that show the location of major facilities, services, and other assets in the Study Area and its surroundings, as well as more detailed descriptions on assets by types, including information on performance and planned improvements. Map 34 at the end of this section shows the location of planned improvements for all the assets reviewed in the summary.

To begin with, Map 20 shows that location of public facilities including libraries, fire stations, hospitals, police stations, schools, parks, and non-motorized transportation infrastructure. The following provides performance information on the public facilities shown (does not include hospitals).

Map 20: Public Facilities in East Naples



Source: Collier County and Collier County School District

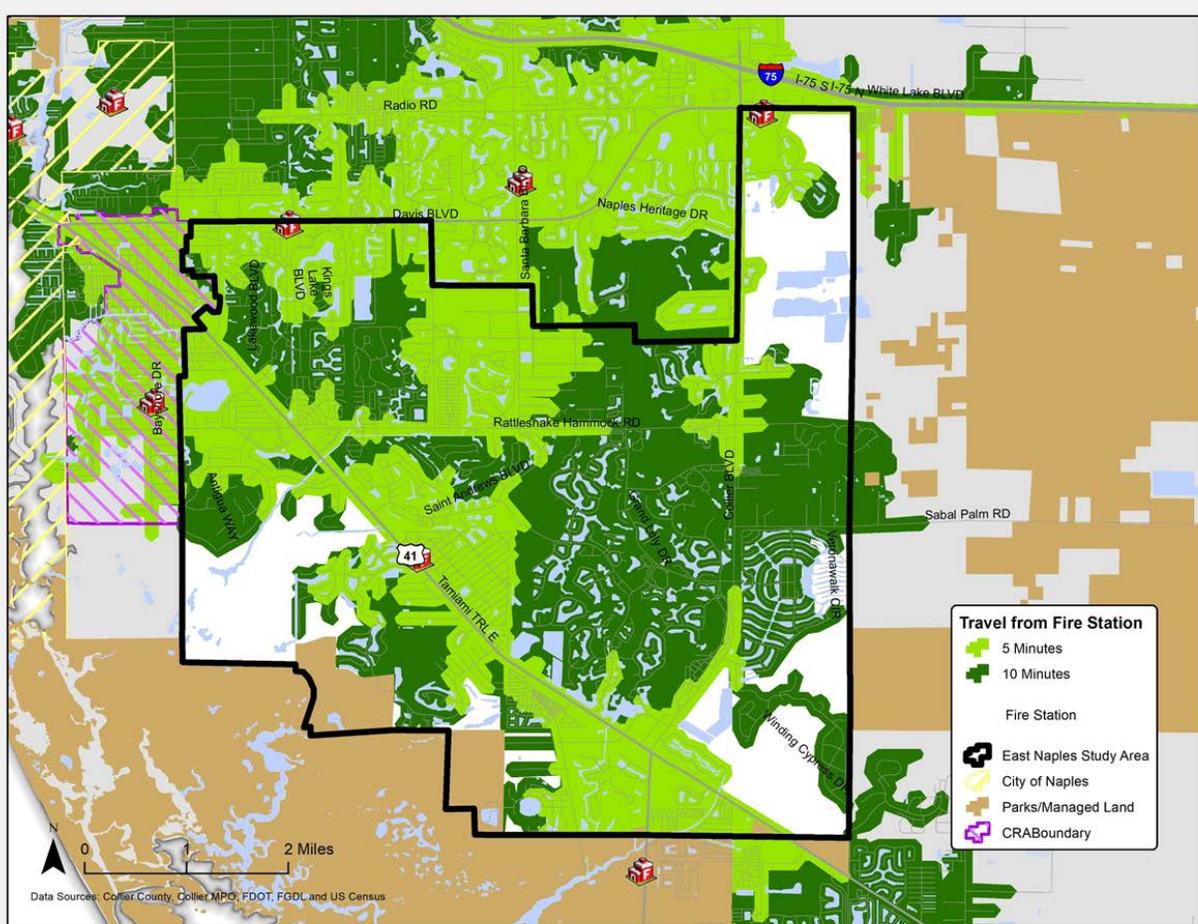
Libraries

Libraries include the East Naples Library and South Regional Library; no major facility additions or improvements are noted in the AUIR or CIP.

Fire

There are eight fire stations in and around the Study Area; all of the Study Area is within a ten-minute travel time from a station (Map 21; note that areas shown in white do not have any roads for assessing accessibility).

Map 21: Travel Time from East Naples Fire Stations to Locations in Study Area

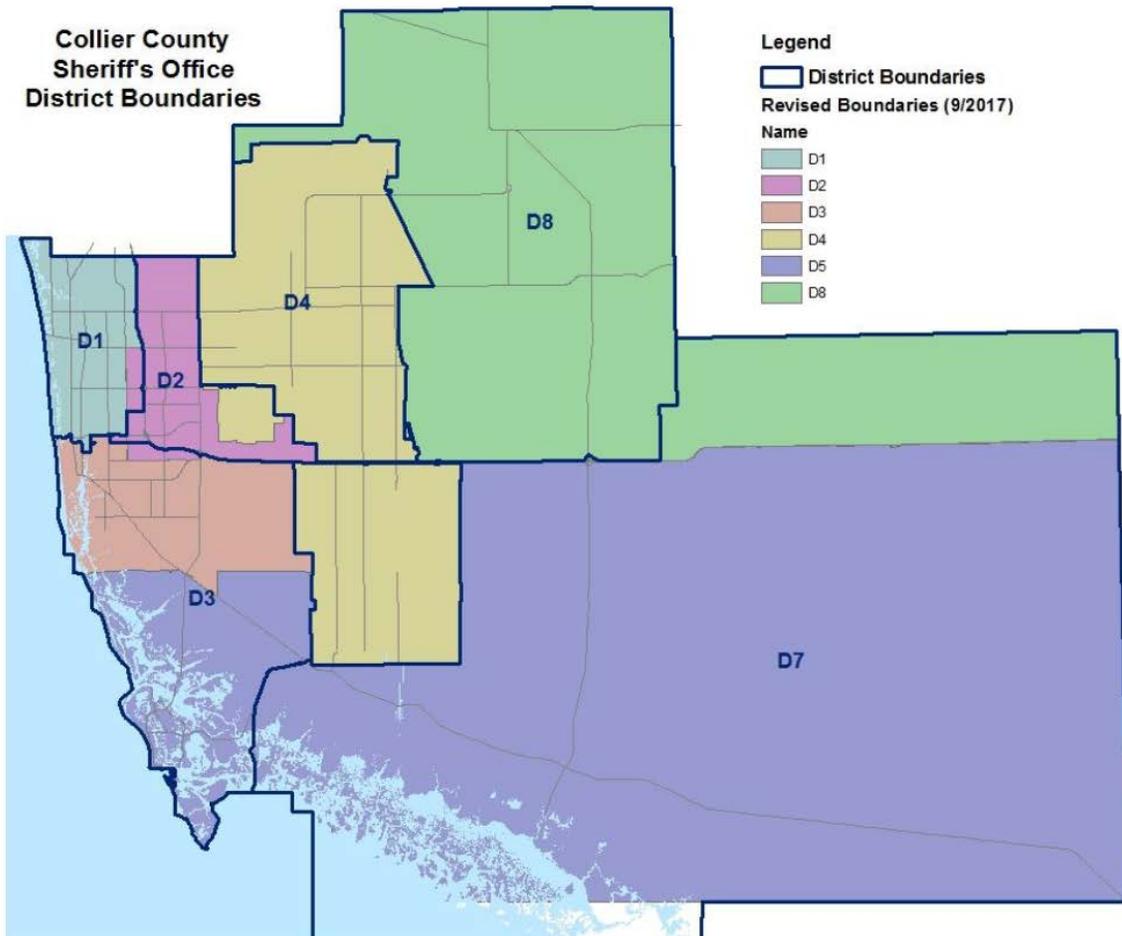


Source: calculations based on facility data from Collier County

Police

The Study Area lies in the revised District 3 for the Sheriff’s Office (Map 22). No major new facilities or expansions for this district are noted in the AUIR or CIP. Table 9 shows average response time to calls for service have increased slightly since 2011, similar to many other districts, and that the average response time for 2018, 11.3 minutes, was between those of the more urbanized areas such as North Naples District (District 1 at 9.4-minute average response time) and more rural areas such as the Everglades District (now District 5 at 12.2-minute average response time).

Map 22: Sherriff's District Boundaries



Source: Collier County Fiscal Year 2019 AUIR

Table 9: Average Response Time (Min.) to Calls for Service by District

	2011	2012	2013	2014	2015	2016	2017	2018
D1 – North Naples	9.0	9.1	9.1	9.2	9.2	9.1	9.5	9.4
D2 – Golden Gate	8.2	8.7	9.7	9.9	9.7	10.1	9.6	10.5
D3 – East Naples	9.5	9.7	10.0	10.6	11.0	11.1	11.8	11.3
D4 – Estates	11.0	10.5	9.9	10.1	10.9	11.2	11.5	12.0
D5 - Everglades	--	--	--	--	--	--	8.4	12.2
D7 – Everglades	12.8	13.6	13.8	12.8	12.1	12.6	12.4	--
D8 – Immokalee	6.0	5.9	5.8	6.3	6.5	6.5	7.3	7.3

Response times represent average time in minutes from dispatch-to-arrival for citizen-generated calls for service. Districts 3 and 7 boundaries changed, created a new District 5 in November 2017; District 7 no longer exists.

Source: Collier County Fiscal Year 2019 AUIR

Schools

There are six elementary schools, two middle schools, and two high schools in and around the Study Area. Table 10 shows the school grades for 2018 and 2019. All schools are maintaining at least a C grade, and most maintained or improved their grades between 2018 and 2019 except for two. The Fiscal Year 2019-2038 Capital Improvement Plan for Collier County Public Schools does not note any major facility expansion or additions for the Study Area.

Table 10: Public School Grades in East Naples

School	2019	2018
Avalon Elementary	C	C
Calusa Park Elementary	B	B
Lely Elementary	C	C
Manatee Elementary	B	B
Parkside Elementary	B	C
Shadowlawn Elementary	C	A
East Naples Middle	C	B
Manatee Middle	B	B
Lely High	B	B
Lorenzo Walker Tech	A	A

Source: Collier County Public Schools

Parks

The following parks are in and around the Study Area; amenities and needs from the analysis and public outreach completed as part of the 2018 Parks and Recreation Plan (PRMP) are noted, with updates where available on certain improvements planned or completed more recently.

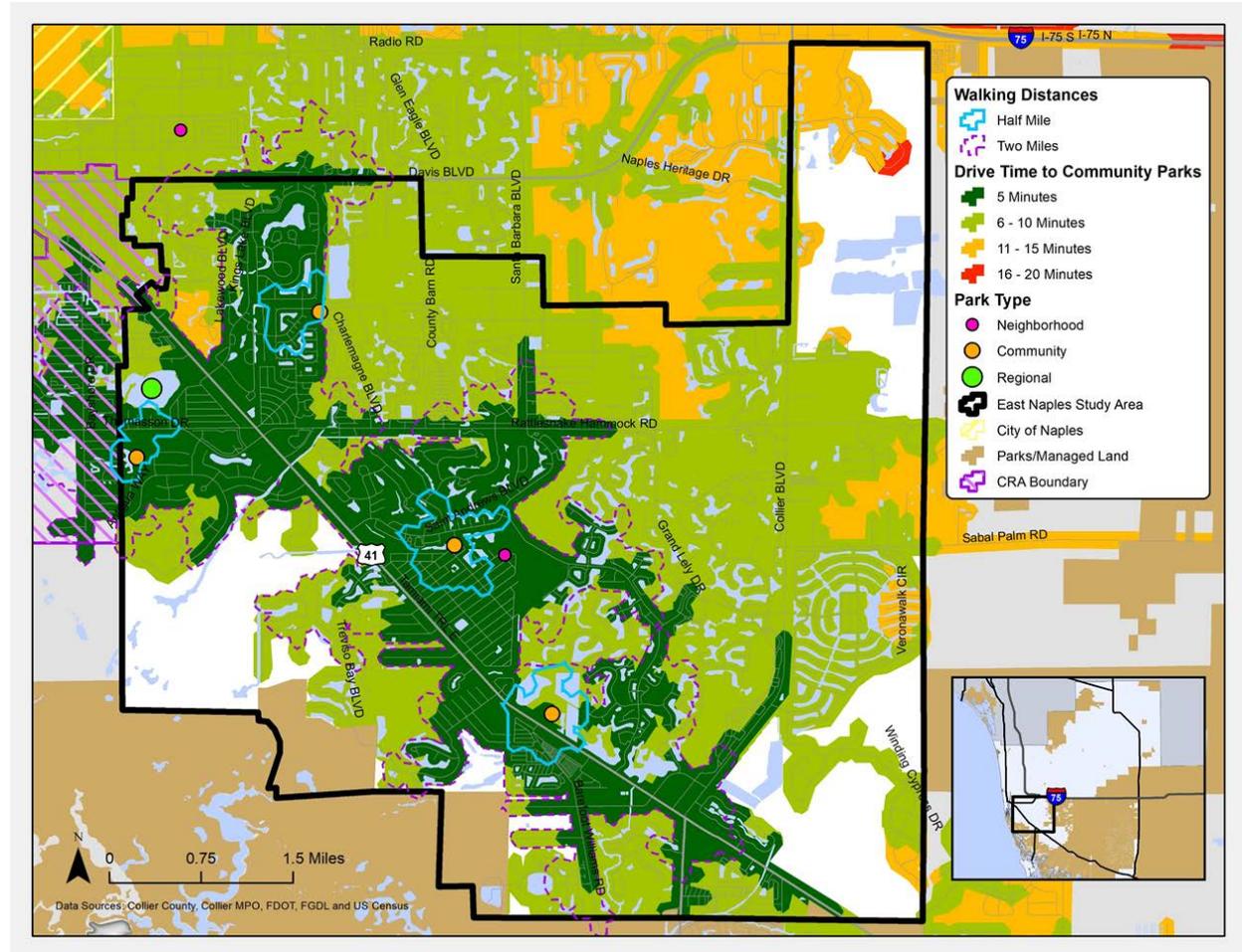
- Eagle Lakes Community Park

- The park’s new community center and pool are completed. Nearly \$60,000 of improvements were programmed for the aquatic facility in Fiscal Year 2019 (AUIR). \$3 million total is planned over the plan’s 5-year timeframe for the Eagle Lakes Community Center Expansion, adding indoor gym/courts to the existing building; the improvement will be funded with impact fees (CIP).
- The PRMP documented over-use of the soccer/multi-purpose fields; installation of artificial turf is anticipated to increase field capacity and accommodate field users from East Naples Community Park after conversion of those fields for pickleball use.
- Other needs noted from outreach and/or analysis from the PRMP included:
 - General maintenance, including fields and invasive species management
 - Use of space behind the community center
 - Free STEAM camps for kids and more education programs
- Sugden Regional Park
 - This park currently offers an inland beach and water sports.
- East Naples Community Park
 - The park is currently used for pickleball and pickleball sports tourism, including the US Open Pickleball Championship. A Master Plan was approved in 2019 laying out 2 phases of upgrades for new courts, facility buildings, parking, and other general improvements to the park. The CIP includes nearly \$2.1 million for construction of a new East Naples Community Park Welcome Center, which will replace the restroom building and the pro-shop, as well as a new maintenance area.
 - The PRMP documented high use of soccer/multi-purpose fields; the fields are planned for conversion to pickleball courts, with the artificial turf installation at Eagle Lakes Community Park anticipated to increase capacity of those fields and help accommodate current East Naples Community Park field users that will be displaced.
 - Other needs noted from outreach and/or analysis from the PRMP included:
 - Upgrades and general maintenance
 - More gymnasiums, parking, and a maintenance barn
- Rich King Greenway Regional Park
 - Currently offers the greenway.
- Cindy Mysels Park
 - Currently offers little league fields.
- Naples Manor Neighborhood Park
 - Current offers a playground.
 - General need for facilities noted in the outreach and/or analysis of the PRMP.

Maps 23 and 24 show the driving time needed to reach community and regional parks. Most of the Study Area is within a 15-minute drive of these parks, and other areas are within a 20-

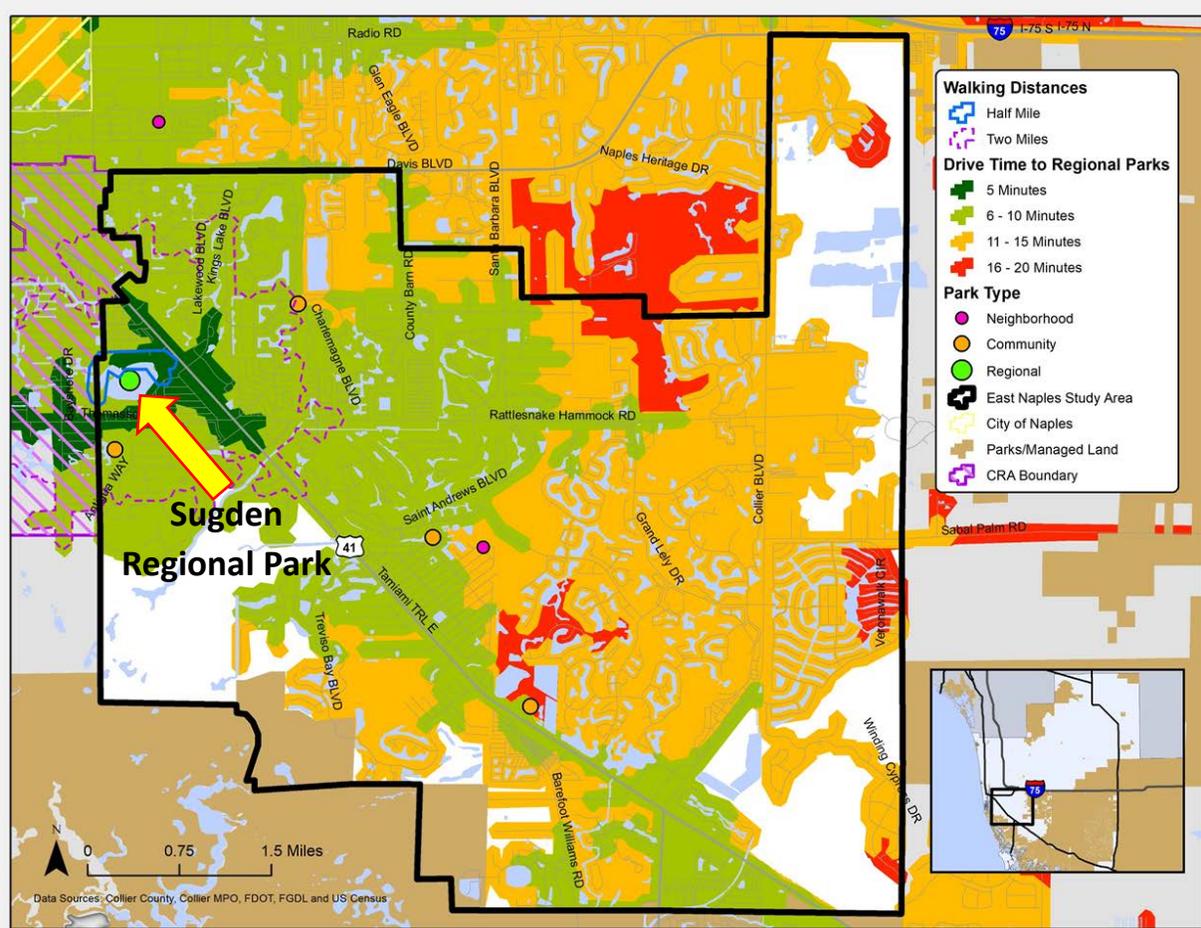
minute drive-time or less (note that areas in white do not have any roads for assessing accessibility). As a result, parks are fairly accessible by car.

Map 23: Driving Time to Reach Community Parks in East Naples



Source: calculations based on facility location data from Collier County

Map 24: Driving Time to Reach Regional Park in East Naples



Source: calculations based on facility location data from Collier County

Non-Motorized Transportation Infrastructure

Map 25 shows existing and proposed bicycle and pedestrian facilities as of the 2019 Collier MPO Bicycle and Pedestrian Master Plan. Several major thoroughfares in the Study Area have a designated bike lane, with one proposed for Rattlesnake Hammock Road. The local neighborhood roads typically have sidewalks and/or paved shoulders. Note that first tier priorities from local walkability studies, one of which was conducted for the Naples Manor area within the Study Area in 2010, were included in the needs assessment for this MPO Plan; Tier 2 and 3 priorities are not yet completed. Map 26 shows the Naples Manor area on which the walkability study focused, as well as the Tier 1 through 3 priorities from the plan and associated recommendations for these roadways. Note that the AUIR and CIP show line items for general sidewalk improvements in the county, with an associated budget of \$10 million over the 5-year capital planning timeframe. County staff is currently planning sidewalks on Catts Street, Carlton Street, Warren Avenue, and Carolina Avenue.

Map 25: Existing and Proposed Bicycle and Pedestrian Facilities in East Naples Area



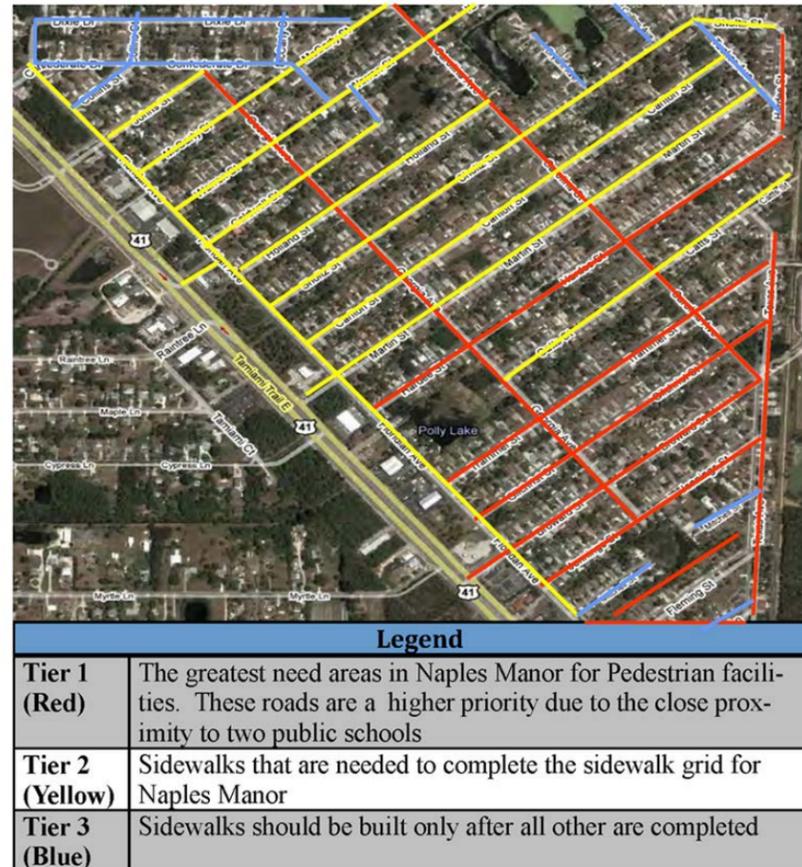
Source: Excerpted from the 2019 Collier MPO Bicycle and Pedestrian Master Plan

Map 26: Findings from Naples Manor Walkable Community Study 2010

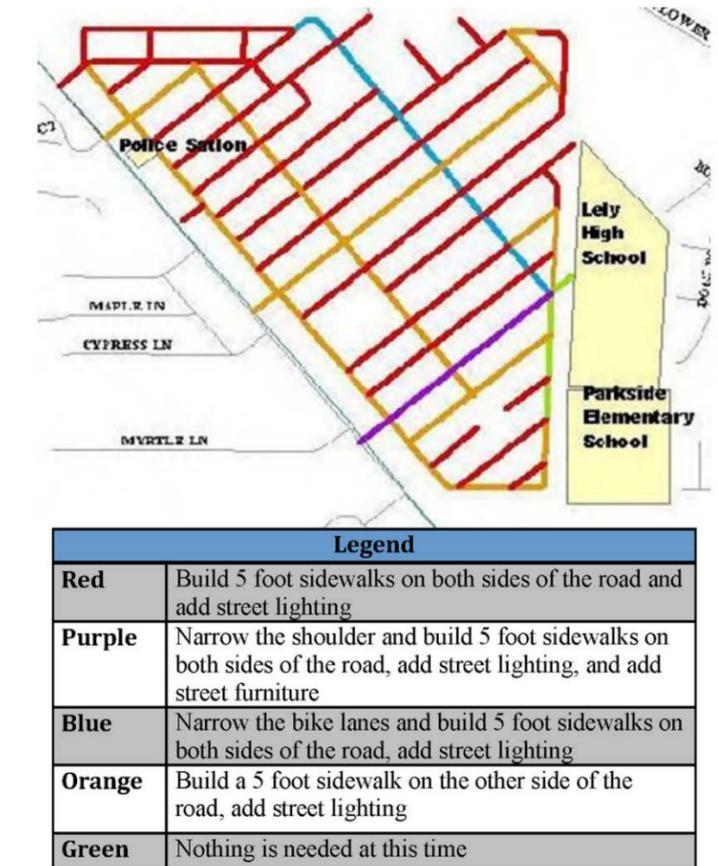
Study Area



Needs by Tier



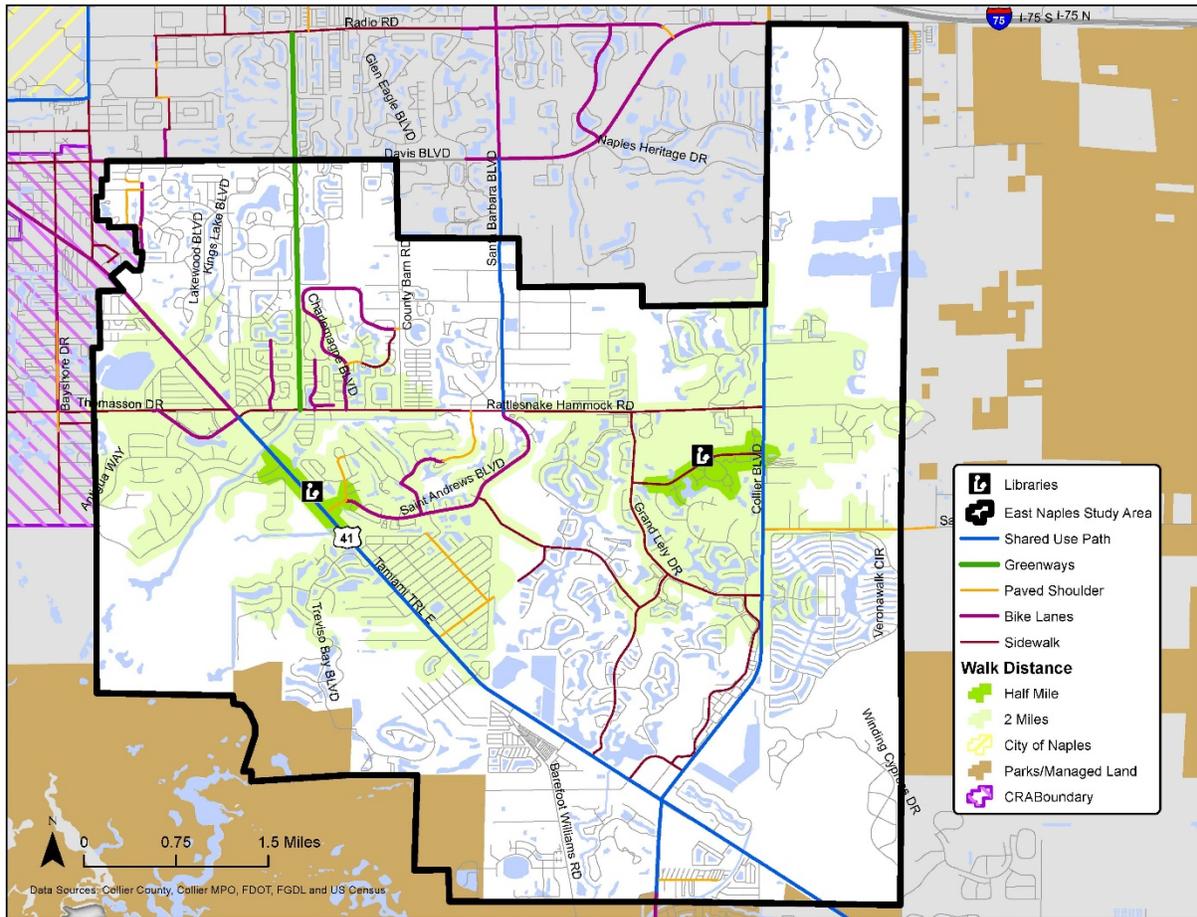
Recommendations



Source: excerpted from the 2019 Collier MPO Bicycle and Pedestrian Master Plan

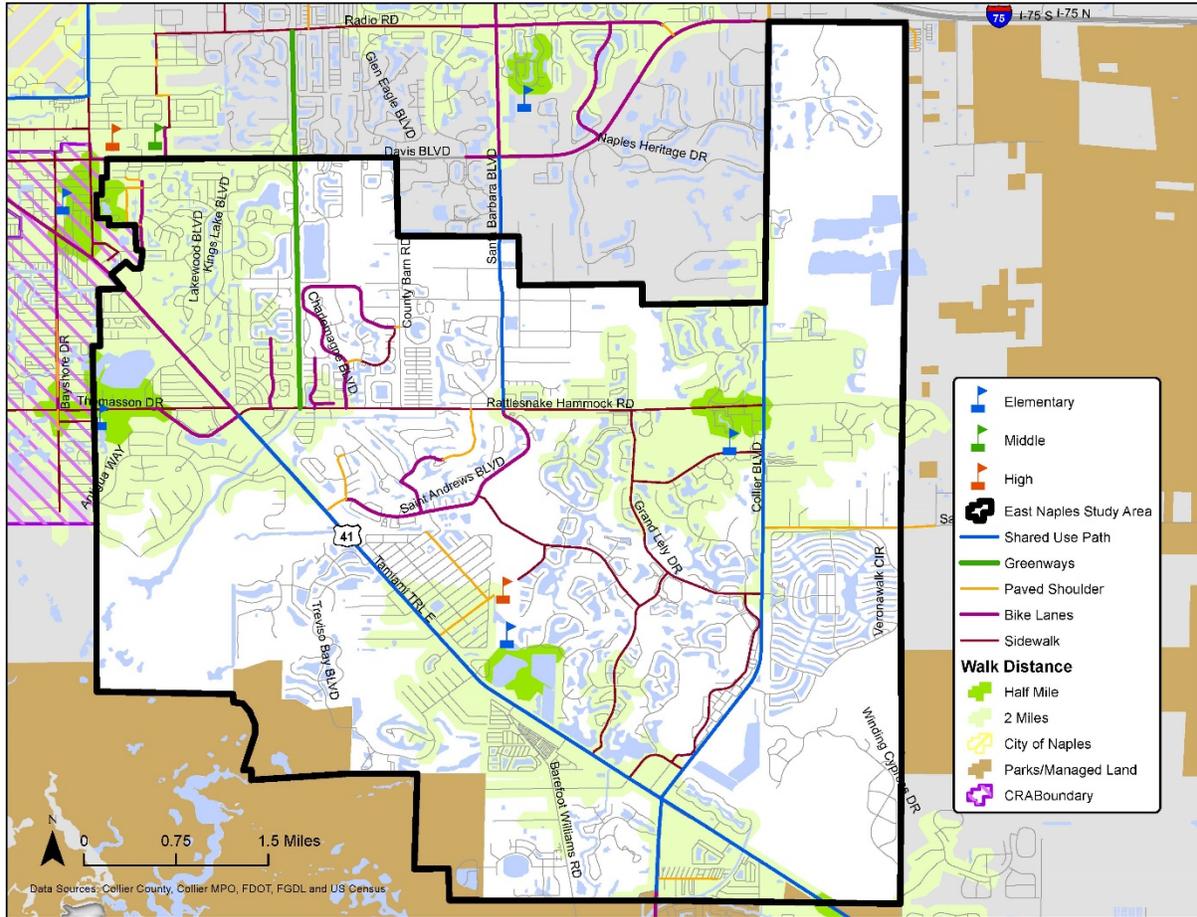
Maps 27 through 29 show areas within walking and biking distances (a half-mile and two miles, respectively) for libraries, schools, and community parks in the Study Area and its surroundings. Walking and biking was measured specifically for community parks since they provide a certain level of amenities and are more widespread relative to regional parks that draw from larger areas. Many sections of the Study Area are outside of these walking and biking distances, indicating they may have to rely on other means such as cars to get to these amenities. For areas within these distances, methods for facilitating walking and biking may be explored.

Map 27: Areas within Walking and Biking Distance of East Naples Libraries



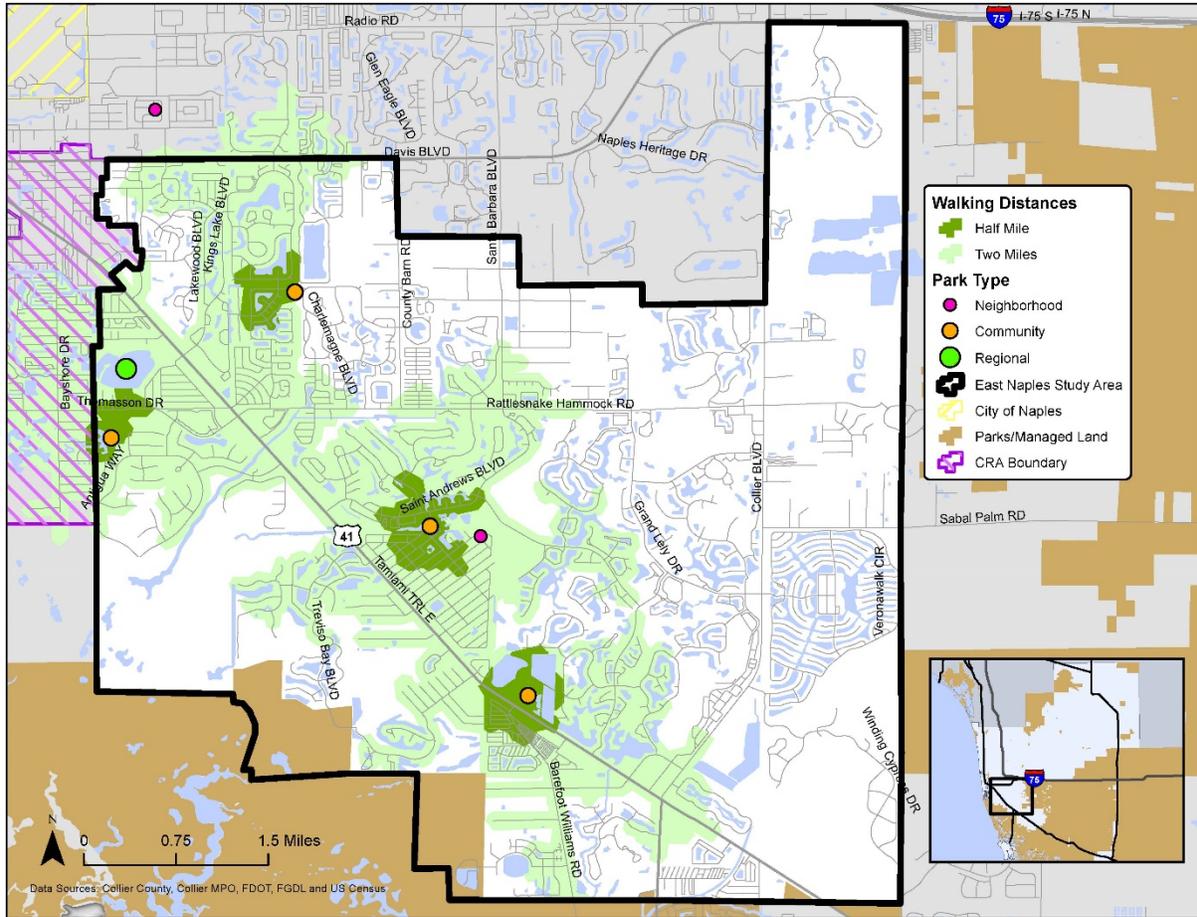
Source: calculations based on Collier County facility data

Map 28: Areas within Walking and Biking Distance of Public Schools in East Naples



Source: calculations based on Collier County Public Schools facility data

Map 29: Areas within Walking and Biking Distance of Community Parks in East Naples



Source: calculations based on Collier County facility data

Roadways

Map 30 shows the roadways in the Study Area with federal functional classes. The Level of Service analysis in the AUIR does not indicate that any major roadway segments in the Study Area are deficient based on the minimum adopted standard. Notes on improvements from the AUIR and CIP include the following:

- US 41 between Airport Pulling Road and Rattlesnake Hammock Road is expected to become deficient by 2027; the AUIR notes that this is in the South US 41 Transportation Concurrency Exception area and plans to monitor the situation.
- Segments of Collier Boulevard south of the Study Area are expected to become deficient in 2028; the AUIR notes plans to widen the roadway between Wal-Mart Driveway and Manatee Road and monitor the situation to Mainsail Drive (see Long Range Transportation Plan Cost Feasible discussion below for additional information).
- The AUIR also notes an intersection improvement for Airport Pulling Road and Davis Boulevard from Fiscal Year 2018; the CIP also notes nearly half a million dollars' worth of improvements for Fiscal Year 2019.
- The AUIR notes the Wilson Benfield Road study and right-of-way considerations; the CIP mentions nearly \$3.5 million in funding forecasted for Fiscal Year 2019 and \$2 million for Fiscal Year 2020 in roadway impact fee funding (see Long Range Transportation Plan Cost Feasible discussion below for additional information).

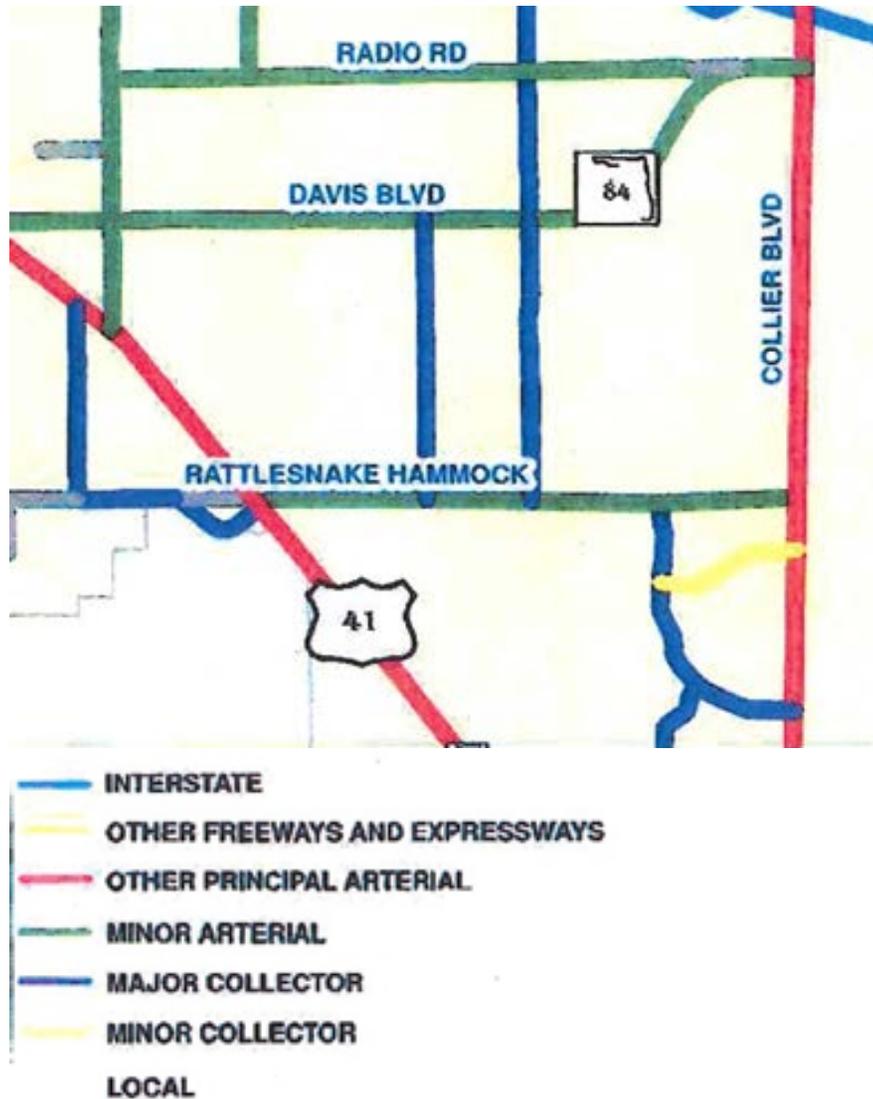
These plans also mention funds for general improvements, such as road resurfacing.

Map 31 shows the Cost Feasible roadway improvements from the 2040 Long Range Transportation Plan; note that this plan is currently being updated for 2045. Improvements in and around the Study Area include the following:

- Davis Boulevard roadway improvement - partially funded in Cost Feasible Plan
- US 41/Collier Boulevard interchange improvement - partially funded in Cost Feasible Plan
- Collier Boulevard roadway improvement, south of US 41 between Manatee Road and Tower Road - funding programmed for 2026 to 2030
- I-75/Collier Boulevard interchange improvement, northeast of the Study Area – funding programmed for 2021-2025
- Benfield Road roadway improvements, east of Collier Boulevard – partially funded in Cost Feasible Plan

There is also one Congestion Management Systems/Intelligent Transportation Systems (CMS/ITS) project identified at the edge of the project area near Airport Pulling Drive and US 41; CMS/ITS projects are moved to the Cost Feasible Plan as funding becomes available.

Map 30: Roadways with Federal Functional Classifications in East Naples



Study Area Classified Roads

Principle arterials:

- US 41
- Collier Boulevard

Minor arterials:

- Davis Boulevard
- Rattlesnake Hammock Road

Major Collectors:

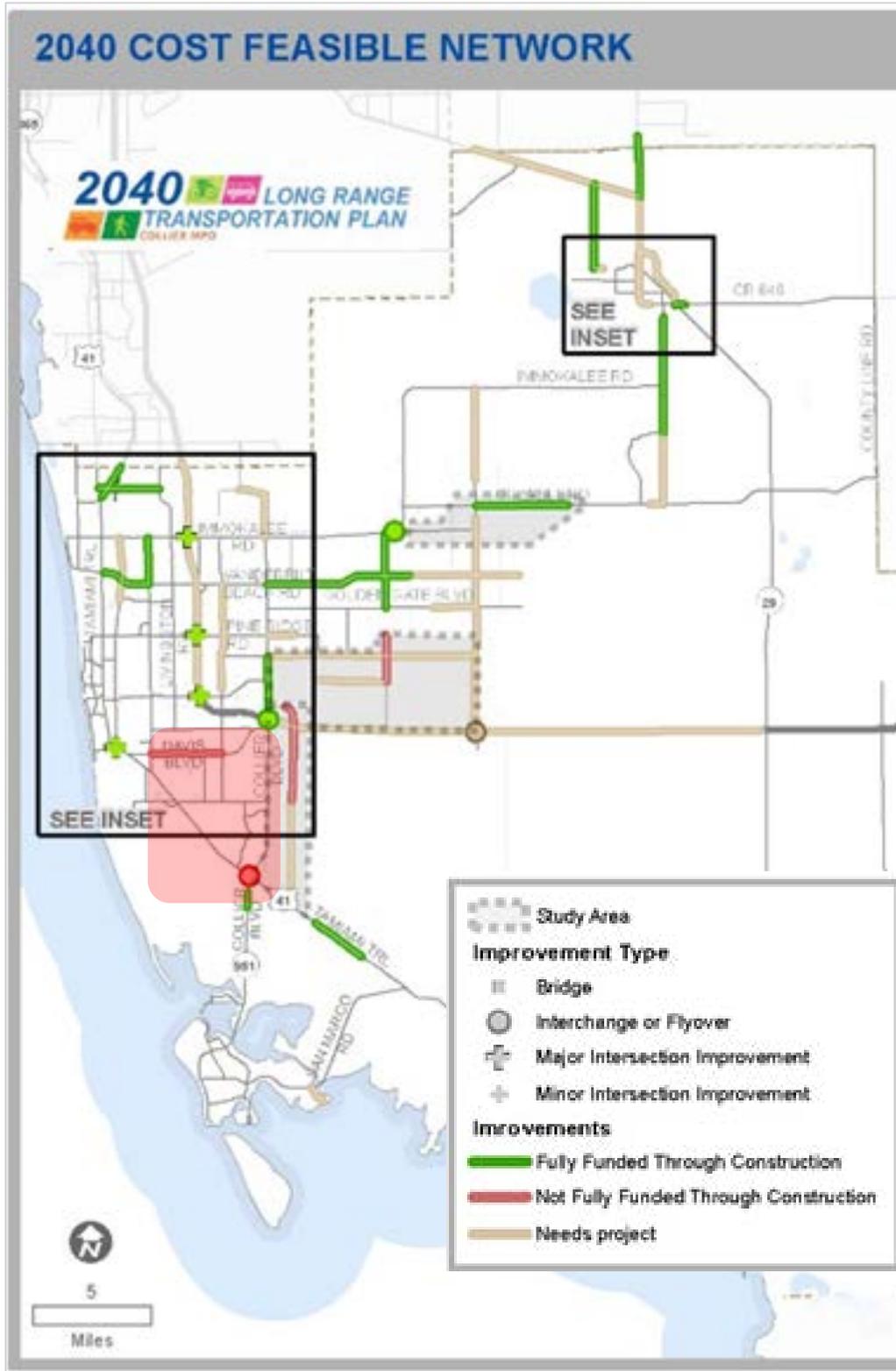
- Thomasson Drive
- County Barn Road
- Santa Barbara Boulevard
- Grand Lely Drive
- Lely Resort Boulevard

Minor Collectors:

- Lely Cultural Parkway

Source: TR-3.4 Map, Collier County Growth Management Plan; note: cropped to highlight Study Area

Map 31: Collier 2040 Long Range Transportation Plan Cost Feasible Roadway Improvements



Source: Collier 2040 Long Range Transportation Plan; note: map cropped to highlight Study Area.

Additionally, a 2014 Collier MPO Pedestrian and Bicycle Safety Study found that the segment of US 41 between Commercial Drive and Guilford Road, and the segment of Airport Pulling Road between US 41 Avenue and Estey Avenue were high pedestrian/bicycle crash corridors. Part of the US 41 segment identified is in the East Naples Community Development Plan Study Area. Based on the findings from the 2014 Study, the Florida Department of Transportation conducted a follow-up Pedestrian/Bicycle Safety audit in 2015. Cardno prepared this safety audit and summarized the findings and follow-up implementation undertaken in a March 2018 presentation. Key observations along the high crash corridor segments of US 41 and Airport Pulling include the following, excerpted from the Cardno presentation:

- *Heavy traffic*
- *High Speed traffic*
- *High bicycle and pedestrian activity*
- *Bicyclists mostly on sidewalk*
- *Bicyclists and pedestrians were sharing the sidewalk*
- *Bicyclists riding with and against traffic flow*
- *Pedestrians crossing mid-block*
- *Appeared to be commuter users versus tourists*

Summarized improvements include different bicycle facilities types, speed reduction measures, improved site distance for side streets, driveway crash countermeasures (reduce driveway conflict points, reduce turning radii, crosswalk markings, etc.), intersection improvements (crosswalks, signal improvements, etc.), mid-block crossing improvements, and general corridor improvements (narrower lanes, wider sidewalks). Non-capital and design measures included enforcement and education measures.

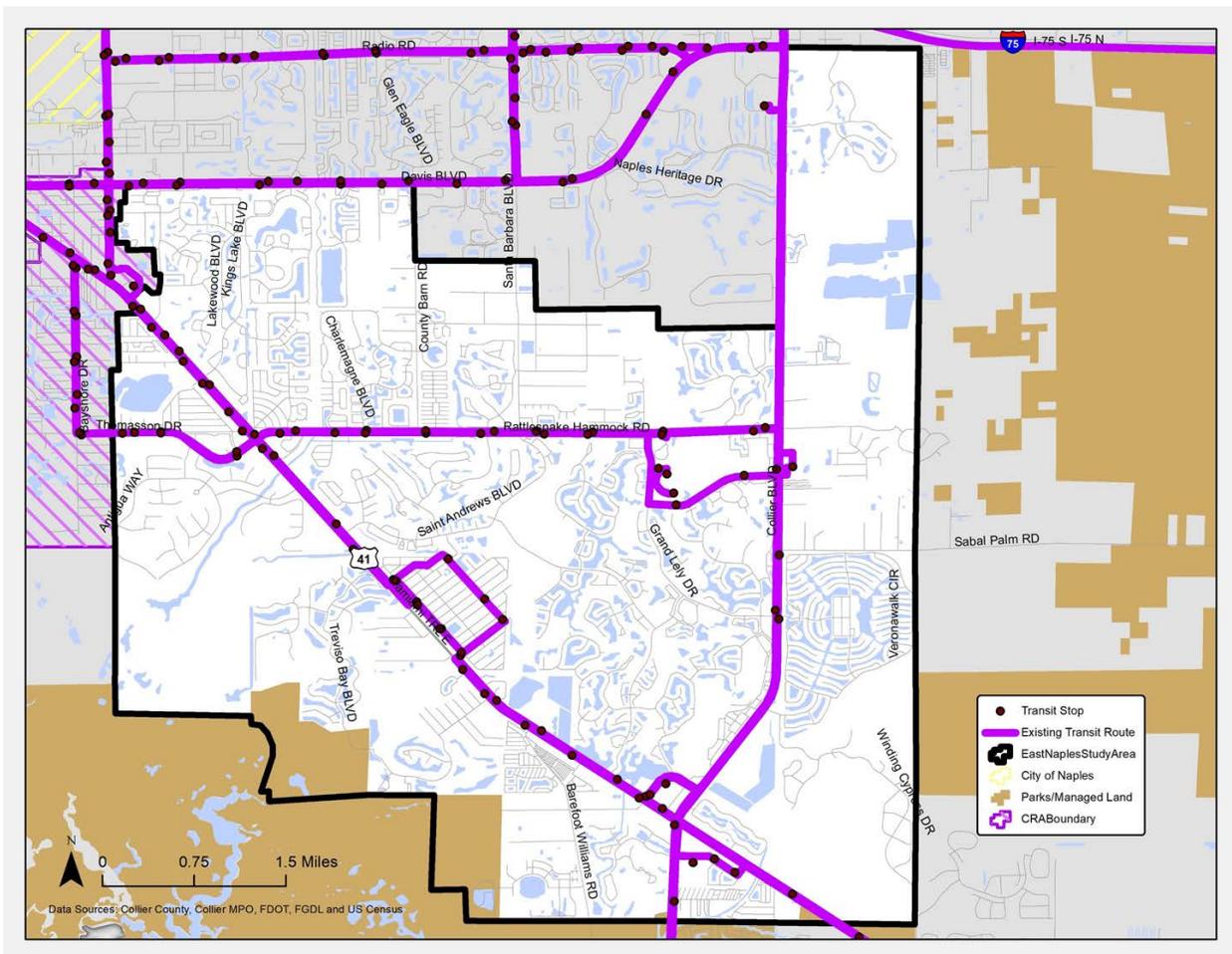
Funded improvements noted include those at Commercial Drive/Palm Street, Airport Pulling Road, Courthouse Shadows/Espinal Boulevard, and Calusa Avenue/Great Blue Drive.

Fiscal Year 2019 landscaping capital projects noted in the CIP include Collier Boulevard between US 41 and E Marin Circle (\$1.8 million), Davis Boulevard between County Barn Road and Santa Barbara Boulevard (nearly \$373,000), and Santa Barbara Boulevard between Rattlesnake Hammock Road to Davis Boulevard (\$1.6 million). US 41 landscaping is also generally noted (nearly \$71,000).

Transit

Map 32 shows the current transit routes in the Study Area, along with transit stops. Many of the major thoroughfares have transit service, with stops located along these thoroughfares. Due to the land use and roadway configuration in the area discussed in Section 4.0, the stops may be difficult to access easily from central residential neighborhoods in the Study Area since access to the thoroughfares is somewhat limited. Additionally, the frequency with which the transit services run (headways) ranges between 1 and 1.5 hours, which poses an additional challenge in using transit.

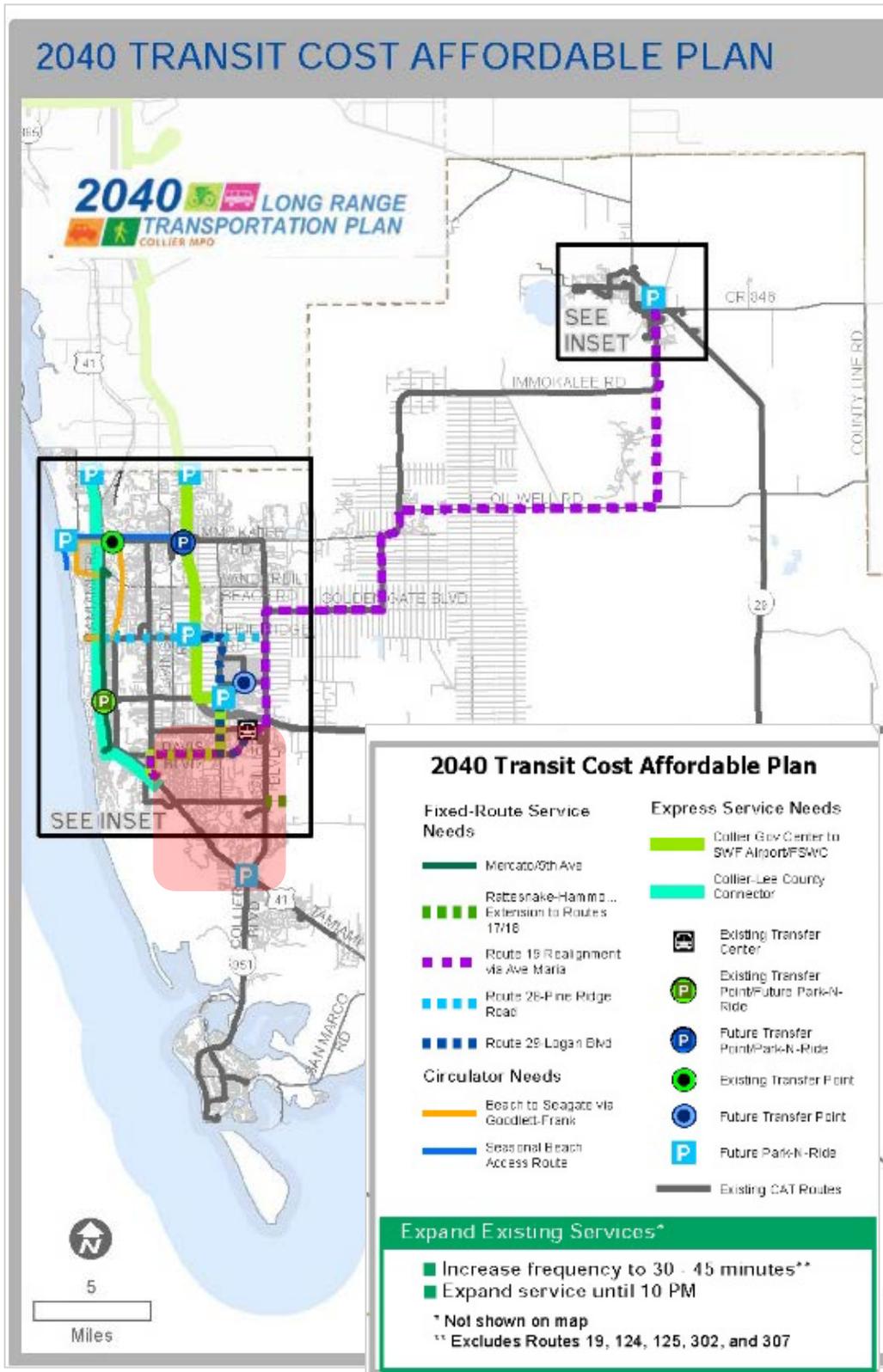
Map 32: Transit Routes in East Naples



Source: Collier Area Transit

However, improvements to Routes 17/18, Route 19, Route 29, express service between the Government Center and the airport, and express service between the Government Center and Lee County are in the Transit Cost Affordable Plan for the Collier 2040 Long Range Transportation Plan (Map 33). Additional information on transit improvement can be found in Appendix B.

Map 33: Collier 2040 Long Range Transportation Transit Cost Affordable Plan



Source: Collier 2040 Long Range Transportation Plan; note: edited to remove inset maps for clarity.

A Brief Note on Other Infrastructure

Other infrastructure related to drinking water, stormwater management, wastewater, and solid waste are not a primary focus of this plan, yet it is important that these services are adequately provided for current and future development. Highlights of improvements noted in the AUIR and CIP are noted here. County utilities staff indicates that there should be no major stormwater capacity issues in the area assuming current stormwater design criteria is followed for development and redevelopment, and there are no encroachments into the natural areas or storage areas. Capital stormwater improvements noted in the AUIR and CIP include those in the Lely Area Stormwater Improvement Project area, Old Lely, Naples Manor, and Griffin Road (south of US 41 near Barefoot Williams Road) areas. Regarding water, staff does not note any pressing capacity issues at this time, and the CIP notes funding for pipe replacement in the Old Lely area. Regarding wastewater, improvements include updates to the South County Water Reclamation Facility; County staff notes that there is a phased project underway to transfer wastewater at up to 4 mg/day from the south plant to the north plant to address stressed sewer capacity.

For solid waste, the CIP shows funding for improvements for the East Naples Recycling Drop Off Center. Staff notes that they have done an initial review for potential sites for a new recycling drop-off center in or near the community given interest from business owners and residents.

Map 34: Summary of Major Planned Facility/Infrastructure Improvements in the Study Area



Note: includes improvements for facilities and infrastructure of focus and included in the FY 2019 AUIR, FY 2020 CIP, the 2040 LRTP Cost Feasible Plan (including improvements with at least partial funding) and Transit Cost Affordable Plan, and the 2019 Collier MPO Bicycle and Pedestrian Master Plan.

7.0 Policy Review

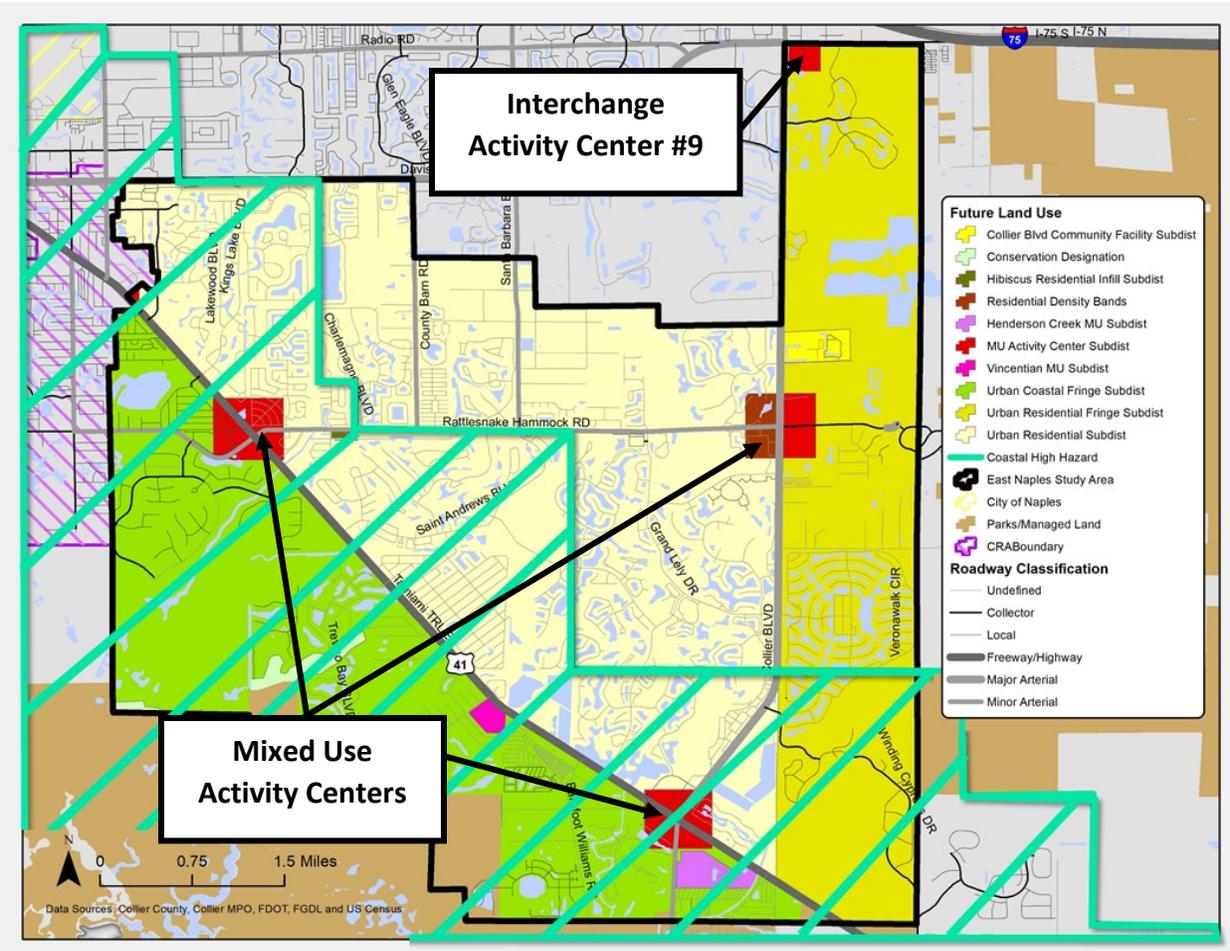
The following provides an overview of key considerations from the existing Growth Management Plan and Land Development Code.

Growth Management Plan

The following are some key takeaways from the density analysis and general review of the Growth Management Plan:

- Major Future Land Use categories of the area include Urban Residential, Urban Residential Fringe, and Urban Coastal Fringe, as well as the Mixed-Use and Interchange Activity Centers (Map 35 and Table 11 for related maximum densities).
- Key portions of the Study Area, including the US 41 corridor, lie in the Coastal High Hazard Area (CHHA), which formally limits density allowances generally to 4 dwelling units per acre (DUPA; see Table 11).
- Mixed Use Subdistricts allow for the redevelopment of C-1 through C-3 zoning with a mix of commercial and residential, although note that areas in the CHHA are still limited to 4 DUPA (further details are in Sec. 4.02.38 of the Land Development Code).
- Mixed-Use and Interchange Activity Centers are allowed the maximum densities of their respective subdistricts, although several of these areas are also limited by density restrictions in the CHHA and Urban Residential Fringe subdistrict limitations on densities.
- As of the current Future Land Use plan, additional residential density in the area would need to be considered for areas generally north of US 41 and west of Collier Boulevard.
- There is general support expressed for “Smart Growth” (e.g., walkable, mixed-use development) policies in Objective 7 of Future Land Use Element.
- Part of the project area is also in a Transportation Concurrency Exception Area (TCEA, Map 36), which can allow for more urban-style approaches to managing transportation needs and level of service. Note that an ongoing Transit Impact Analysis for Collier County provides the following preliminary recommendations:
 - Consolidate the TCEA and the Transportation Concurrency Management Areas (TCMAs) into a transit-oriented infill and redevelopment district, adjusting the transportation review process to incentivize infill and redevelopment in support of transit and non-motorized modes by simplifying the Transportation Impact Study requirements while retaining certain requirements to guard against adverse traffic impacts of large-scale development.
 - Adjust requirements and strategy options related to Transportation Demand Management strategies applied in the TCEA and TMAs for increased effectiveness.
 - Allow density increases in the established activity centers and mixed-use corridors. Note that certain activity centers in the project area may face certain limitations due to location in the CHHA, as noted previously.

Map 35: Future Land Uses in Study Area



Source: Collier County

Table 11: Major Future Land Use Categories and Allowed Densities in East Naples

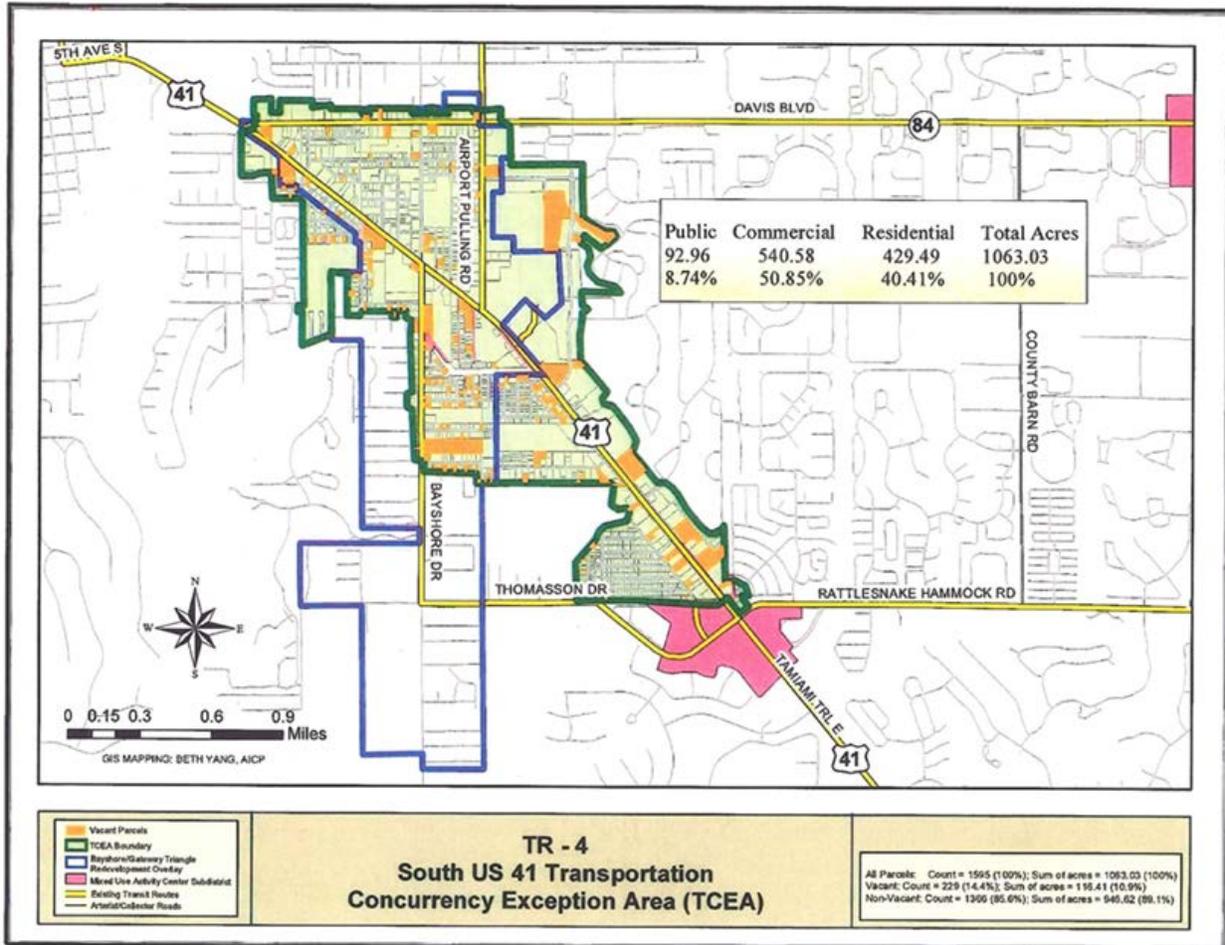
Future Land Use Category	Base Density	Applicable Density Bonuses and Additional Density
Urban Residential	4 DUPA	<p>Affordable Housing Density Bonus: up to 12 additional DUPA</p> <p>Additional options if located outside the CHHA for a maximum of up to 16 DUPA:</p> <ul style="list-style-type: none"> • Conversion of commercial zoning consistent with Collier County Zoning Re-evaluation Program (Ord. 90-23): up to 16 DUPA for every acre of commercial zoning converted to residential • For project within one mile of Mixed Use Activity Center, Interchange Activity Center and located within a residential density band: 3 DUPA • Residential in-fill for eligible small projects: up to 3 DUPA if 1 of the units is transferred from a Sending Land • Project has direct access to two or more arterial or collector roads as identified in Transportation Element: 1 DUPA <p>Mixed-Use Activity Centers allow up to 16 DUPA outside CHHA; otherwise density limited to 4 DUPA. Hotel/motel uses in these centers are allowed at maximum of 26 DUPA</p>
Urban Residential Fringe	1.5 DUPA	<p>Maximum of up to 2.5 DUPA with 1 additional DUPA from TDRs from Sending Lands designation in Agricultural Rural/Rural Fringe Mixed Use District.</p> <p>Affordable Housing Density Bonus for specified areas: up to 6 additional DUPA</p> <p>Up to 10% density bonus for open space/vegetation retention (Conservation and Coastal management Element Policy 6.2.5(6)b.1)</p> <p>The general base density and applicable bonuses/additional density allowances also apply in Mixed Use Activity Center; hotel/motel uses in these centers are allowed at maximum of 26 DUPA</p>

<p>Urban Coastal Fringe (located seaward of Coastal High Hazard Area)</p>	<p>4 DUPA</p>	<p>Certain properties may exceed 4 DUPA if deemed consistent by policy where higher densities are allowed (e.g., RMF-6 zoning allows residential multi-family at 6 DUPA).</p> <p>Affordable Housing Density Bonus: up to 12 additional DUPA (additional mitigation may apply)</p> <p>The general base density and applicable bonuses/additional density allowances also apply in Mixed Use Activity Centers; hotel/motel uses in these centers are allowed at maximum of 26 DUPA</p>
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Source: Collier County Growth Management Plan. Notes (see the Growth Management Plan for further details):

- *There are some exceptions to the above general rules, including for certain parcels that have used the Zoning Reevaluation Ordinance, Ord. No. 90-23.*
- *Some subdistricts may qualify for additional density through the Transfer of Development Rights program, yet that is not included here since there are no receiving areas in the Study Area.*
- *Additional Future Land Use categories in the area include certain Mixed-Use subdistricts and others shown in Map 35.*

Map 36: South US 41 Transportation Concurrency Exception Area



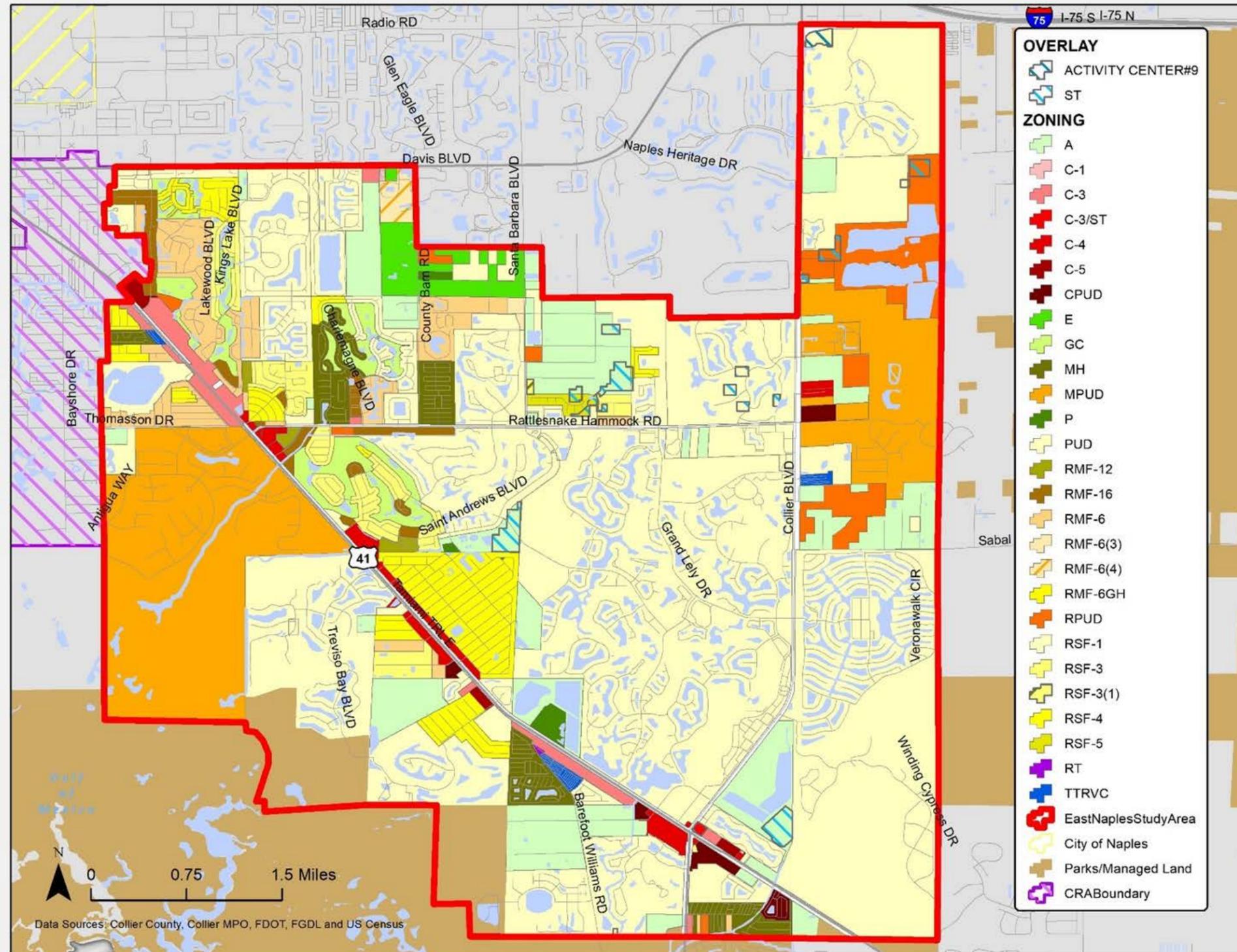
Source: Collier County

Land Development Code

- Much of the Study Area is zoned as Planned Unit Developments (PUDs), which carry zoning regulations specific to each development (Map 37). Provisions for Mixed Use PUDs and Residential Mixed Use Neighborhood Center PUDs are contained in Sec. 2.03.06, yet these provisions do not include required ranges for the mix of shares of commercial and residential (the latter in fact includes a maximum share for neighborhood commercial). This finding may hamper the creation of truly mixed-use developments if these types of PUDs are used in the redevelopment of the area; typically mixed-use developments in the county include less than a 10% share of commercial development. For further analysis on how these have been built out and vacancy opportunities, particularly for new desired commercial development, see Section 5.0.
- As mentioned in the previous sub-section, Mixed Use Subdistricts allow for the redevelopment of C-1 through C-3 zoning with a mix of commercial and residential, although note that areas in the CHHA are still limited to 4 DUPA. Additionally, relevant commercial categories, mainly along US 41, are relatively shallow, which may constrain commercial development, redevelopment, or mixed-use development through Mixed Use Subdistricts (see additional discussion in Section 8.0). Lot depth may be considered to help stimulate development and redevelopment of these commercial areas.
- Tractor Trailer-Recreational Vehicle Campground District areas along the corridor may also be evaluated for mixed-use, with consideration of transitioning existing users of those sites.
- Design criteria for undesirable uses:
 - Sec. 5.05.05 includes separation requirements (currently 500 feet) and other special design standards for facilities with fuel pumps; evaluate the current separation standard and also the placement of pumps at the rear of the development, away from the main façade and main roadway frontage.
 - Public outreach activities from the 2018 US 41 Corridor Study indicated that there was a desire to limit self-storage uses in the area. “Motor freight transportation and warehousing (mini- and self-storage warehousing only)” is a permitted use in C-5 and a conditional use in C-4 (Sec. 2.03.03). A proposed amendment to the Land Development Code is under consideration to address concerns with the self-storage use by allowing it in C-4 commercial districts only in combination with other permitted uses as part of a mixed-use development and if it occupies less than 50% of the total area of the first floor. The East Naples Community Development Plan process will document these efforts and evaluate other appropriate options to adjust the Land Development Code to discourage and/or obtain more preferable design for new uses of this type.
- Design criteria for desired development:

- There are already design criteria for Mixed use Subdistricts (Sec. 4.02.38) that include screening provisions through landscaping and off-street parking placement at the rear or side-street of the buildings, which can aid with creating a walkable environment.
- Sec. 4.02.01 includes setbacks for commercially zoned properties; setbacks for C-3 through C-5, commercial zones prevalent in the Study Area, are typically 15 feet or above. Evaluate these setbacks to support walkability while also meeting design desires established through public outreach activities.
- Evaluate commercial-to-commercial buffer requirements in 4.06.00 to support more accessible and walkable commercial development in the Study Area.
- Evaluate placement of off-street parking in the rear for commercial development, which relates to parking standards in Sec. 4.05.00; this may be targeted to certain areas, such as in an Activity Center and along certain segments of major corridors.
- Note that access management for Mixed Use Activity Centers is regulated in Sec. 4.04.02 and the associated Access Control Policy; these provisions can be evaluated as needed in relation to access of commercial development in Activity Centers by non-motorized means.
- Sec. 4.02.23 includes provisions for development in Activity Center #9; these are mainly focused on architectural style and landscaping.
- Table 12 recreates affordable housing density bonus regulations in the code.
- Additional zoning regulations will be evaluated as needed based on project analysis and public engagement outcomes in the initial stages of the project.

Map 37: Zoning Districts in Project Area



Main development districts for potential areas of change:

- C-1
- C-3
- C-4
- C-5
- TTRVC
- Innovation Zone (Activity Center #9, overlay)

PUD districts:

- PUD
- MPUD
- RPUD
- CPUD

Areas of stability:

- A
- E
- GC
- MH
- P
- RMF-6
- RMF-12
- RMF-16
- RMF-6(3)
- RMF-6(4)
- RMF-6GH
- RSF-1
- RSF-3
- RSF-3(1)
- RSF-4
- RSF-5
- RT
- ST (overlay)

Source: Collier County

Table 12: Table A. Affordable Housing Density Bonus
(Additional Available Dwelling Units Per Gross Acre)

Maximum Allowable Density Bonus by Percent of Development Designated as Affordable Housing ^{1, 2, 3}										
Product (% of MI)	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
Gap (>120—≤140) ^{4, 5}	1	2	3	4	5	6	7	8	n/a	n/a
Moderate (>80—≤120) ⁴	2	4	5	6	7	8	9	10	11	12
Low (>50—≤80)	3	6	7	8	9	10	11	12	12	12
Very-Low (≤50)	7	8	9	10	11	12	12	12	12	12

¹ Total Allowable Density = Base Density + Affordable Housing Density Bonus. In no event shall the maximum gross density exceed that which is allowed pursuant to the GMP.

² Developments with percentages of affordable housing units which fall in between the percentages shown on Table A shall receive an AHDB equal to the lower of the two percentages it lies between, plus 1/10 of a residential dwelling unit per gross acre for each additional percentage of affordable housing units in the development.

³ Where more than one type of affordable housing unit (based on level of income shown above) is proposed for a development, the AHDB for each type shall be calculated separately. After the AHDB calculations for each type of affordable housing unit have been completed, the AHDB for each type of unit shall be added to those for the other type(s) to determine the maximum AHDB available for the development. In no event shall the AHDB exceed 12 dwelling units per gross acre.

⁴ Owner-occupied only.

⁵ May only be used in conjunction with at least 20% at or below 120% MI.

8.0 Public/Stakeholder Involvement

Public and stakeholder involvement included two calls with members of the development community active in the local scene, a preliminary meeting with the East Naples Civic Association Board, and a public survey along with opportunities for comment as part of a public webinar and via the project email address. The following summarizes findings from these activities.

East Naples Civic Association

The project team met with East Naples Civic Association Board members from 3:40 to 4:30 pm on February 12, 2020. The meeting began by reviewing some preliminary findings from the project team's analysis, which was followed by a question and answer discussion. The following key takeaways from the discussion are listed by topic area.

- Study area:
 - The Civic Association has a larger boundary than the project study area.
 - There is interest from Civic Association members in expanding the study area further east to Manatee Boulevard. Staff noted that further east on 951, the land use designation changes to rural fringe, which informed the boundary for the study area; the rural fringe area is currently under its own re-study as part of an in-house project.
 - There was a suggestion to add an area north of the current study area, up to Davis Boulevard and I-75.
- Relevant planning studies for reference include:
 - Bayshore CRA plan
 - Activity Center #9 planning
 - Golden Gate City plan [note: after review, the project team found some differences between the land use and transportation configuration of the Golden Gate City area when compared to the East Naples Study Area which may limit applicability of this plan to the Study Area.]
- Concerns/Interests:
 - The concentration of low-income housing in the area is a concern; the Civic Association is interested in data on this point.
 - The Civic Association expressed concern about school quality; it is interested in data on schools and performance.
 - Storage uses on vacant commercial and car washes were noted as concerning land uses.
 - Interest was expressed in attracting redevelopment and commercial/restaurants through incentives; note that there are some uses outside the current study area that might affect access to commercial (e.g., outlet mall south of US 41 along Collier Boulevard).

- Interest was expressed in funding mechanisms for infrastructure and incentives (e.g., MSTU); there was a proposal for Michelle Arnold from the County to speak on MSTUs.
- Transportation:
 - The project team noted the analysis would be high-level and information taken from other plans. It would include transportation considerations to support connectivity and recreational opportunities.
 - There was a recommendation to add Santa Barbara to major thoroughfares/collectors

Development Stakeholders

The project team held two calls with various members of the local development community, on March 25, 2020 and April 9, 2020. The following are key takeaways by theme from these discussions:

- What the market will provide is determined by supply/demand and the economics of projects. A good amount of commercial acreage is already approved, and simply allowing more intensity will not result in more commercial acreage built. Look at vacancy rates for existing commercial structures to get an indication of current market demand.
- Rezoning is always a barrier and entitling small properties is often not worth the effort; having zoning to support desired direction is helpful, but there is still a need to make projects more cost-effective.
- Doubling intensity to meet the target will be challenging; construction costs are high. Additionally, some lots on US 41 have high prices even though they are small parcels.
- The planning process needs to focus on incentives to make the developments more cost-effective. Appealing incentives include:
 - Flexibility on development standards
 - Expedited reviews
 - Waiving impact fees (aside from the standard credit process)
 - Tax increment financing investments (note that tax increment is applied in nearby community redevelopment area and in the Innovation Zone area to the north east of the project study area).
- It was noted that there are possibly only two truly mixed-use projects exist in Lee and Collier County; mixed-use is very limited. Mixed-use would require intensity to make the numbers work out and would need residential for immediate returns.
- The area needs to redevelop to have more dense areas in terms of residential; this is a major limiting factor. However, the area is seeing more apartments going in.
- Seasonal population and the associated market can also pose a challenge; a high seasonal population can limit the number of people frequenting establishments for part of the year.

- Depth can also pose a challenge, particularly on an angled roadway such as US 41 that may create lot shapes that are more difficult to work with; this issue posed a challenge at Courthouse Shadows. Adding depth can help fix the geometry of a lot.
- It was recommended to check the build-out of existing Planned Unit Developments (PUDs) to understand opportunities for commercial. Other locations with development potential included:
 - The south side of Rattlesnake Hammock Rd north of the hospital could be a shopping area.
 - Shopping center with Goodwill and former Lucky's has multiple owners but is a good opportunity.
- No specific uses were identified to target; there is a need to look at incentives for both residential and non-residential uses, especially to support mixed-use developments. Redevelopment and new commercial and mixed-use development are all types to encourage.

Summary of Public Input

The following are key themes that emerged from input from the general community and public, primarily collected through an online survey that collected responses between May and June 2020 and a public hybrid in-person and virtual workshop that was held June 29, 2020 with over 90 attendees. Community members could also submit additional comments to a project-specific email address. More detailed summaries of input received are in Appendices C and D.

- There were some questions about how the Study Area Boundary was determined, and the inclusion of other surrounding areas. The boundary was informed by the District 1 Commission boundary with some adjustments for land use and transportation patterns. The project team added a surrounding area of influence for consideration to accommodate aspects outside the Study Area and intends that this plan can guide development and redevelopment efforts in other similar parts of East Naples and the county.
- Much of the survey responses came from a demographic that lived at least part time in the study area, did not go to work or school, and were at least 30 years of age.
- The area has great access to amenities and provides great value in terms of what is offered for the affordability of the area, although some community members are concerned about adding more affordable housing to the area.
- The area has potential and could be better developed, but there are concerns about over-building and losing or not having adequate green space and natural areas. Maintaining an aesthetically pleasing appearance for businesses and neighborhoods also emerged as a priority.
- Many community members expressed a desire to rebrand the area, particularly with regards to naming, such as "South Naples" instead of "East Naples".

- Limiting undesired businesses was a need identified in the 2018 US 41 Corridor Study outreach and continues to be cited as an issue for the community in these current outreach efforts.
- More quality, well-designed, and diverse commercial businesses are desired; some respondents felt little additional commercial development is needed, potentially aligning with concerns about over-building and desires to maintain quality. Restaurants were noted as a priority among a variety of desired uses. Business types included both big-box, functional retail and small businesses
- Survey respondents preferred to focus on major corridors including US 41 and Collier Boulevard to evaluate for additional commercial opportunities; US 41 was a corridor that the project team also found to have more potential opportunities through its analysis.
- In terms of implementation approaches to increase desired commercial uses in the area, marketing and incentives tended to have the most widespread support, including considerations to try a mix of different approaches. Marketing and fee incentives were also some of the more highly rated implementation options from the 2018 US 41 Corridor Study outreach.
- Managing traffic flow and general congestion was a topic that emerged from the survey, as well as promoting non-motorized options including biking and walking; most survey respondents recognized the importance of thoroughfares for automobile traffic but were willing to consider compromises to accommodate other transportation methods. Survey respondents also indicated a preference for walkable commercial concepts, such as parking once in a cluster of establishments and walking between them.
- In survey responses, most public facilities and services for the area were rated as mostly satisfactory or as neither satisfactory nor unsatisfactory, falling in the middle; the exception was non-motorized pathways, the public facility/service rated as mostly unsatisfactory by survey respondents. This aligns with findings from the 2018 US 41 Corridor Study.

9.0 Appendices

Appendix A: US 41 Corridor Study Development Style Preferences

Figures 8 through 11 show development type preferences from the 2018 US 41 Corridor Study based on those types that received a preferential vote from a majority of people participating in the public involvement polls. The percentage of preferential votes received by the choice is shown below the images, with percentages in green indicated the share of preferential votes when “all of the above” votes were included; note that “none of the above” was also a response option in these polls. Note that all images are sourced from the Study.

Figure 8: Commercial Development Preferences from 2018 US 41 Corridor Study

Strip Mall



51%

Hotel/Lodging



59%

Destination Shopping



Destination Shopping

79%

Figure 9: Residential Preferences from 2018 US 41 Corridor Study



Figure 10: Live/Work and Mixed-Use Preferences from 2018 US 41 Corridor Study

Live/Work Building



Mixed-Use



Note: the 2018 Study grouped the two mixed-use visuals here together in the analysis of the share of support for certain mixed-use types; the summary of findings indicates strong support for mixed-use of four to five stories. These similarities in building height may be why choices were grouped as such.

Figure 11: General Urban Design Preferences from the 2018 US 41 Corridor Study

Building Scale



65%

Building Placement



71%

Appendix B: Additional Transit Improvement Information

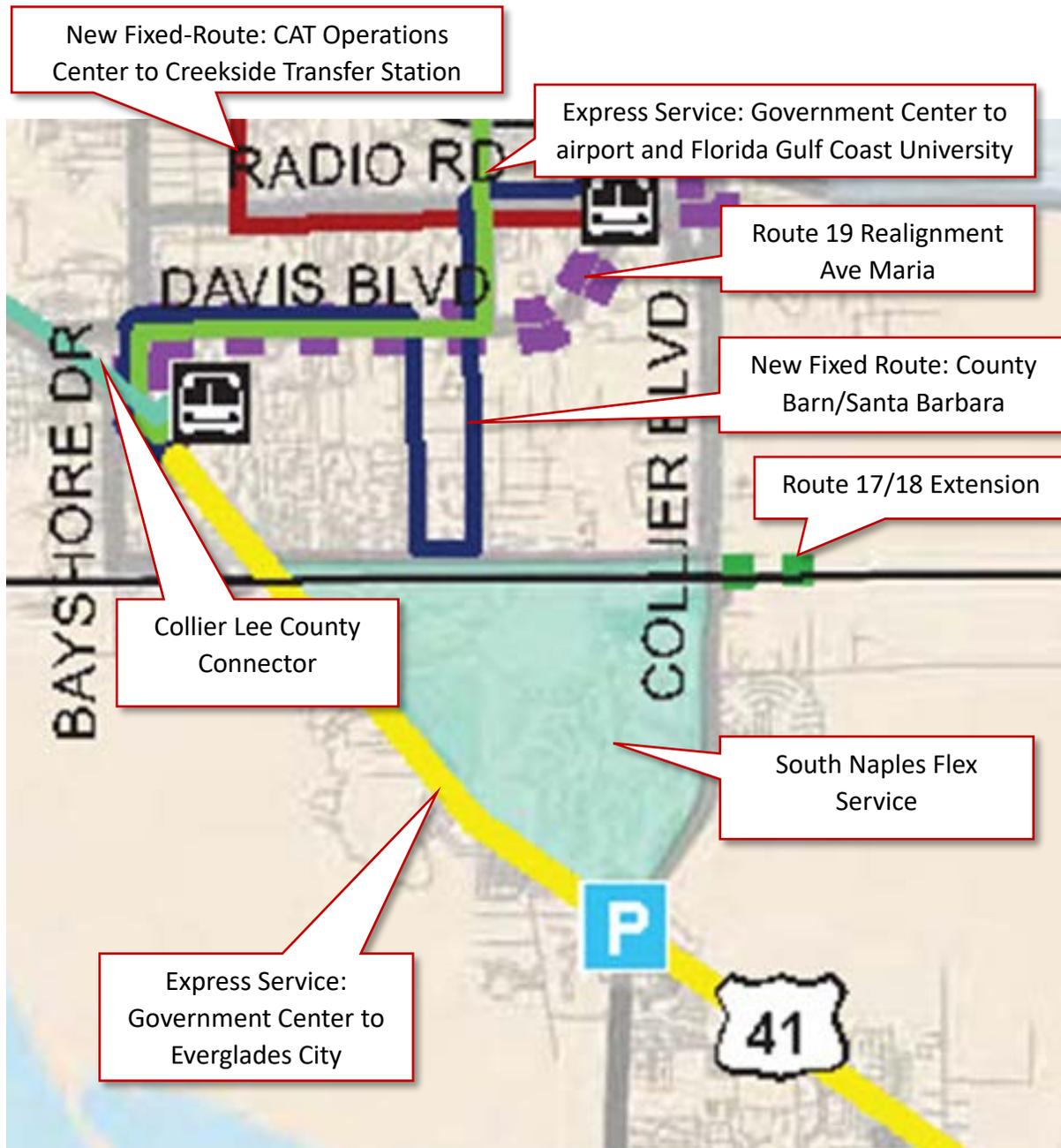
Map 38 shows an excerpt from the 2016-2025 Collier Area Transit (CAT) Transit Development Plan (TDP), with potential improvements for the 10-year planning period. Note that this plan is currently in the process of being updated. Potential improvements identified in the project area include the following, with services providing broader countywide or regional connections noted in addition to local service:

- Fixed route service:
 - Route 17/18 extension along Davis Boulevard; costs for this improvement were estimated at \$1,298,568 and implementation recommended for 2025.
 - Route 19 realignment to Ave Maria; costs for this improvement were estimated at \$940,432 and implementation recommended for 2025.
 - New fixed route service proposed for County Barn/Santa Barbara, connecting the CAT Operations Center and the Government Center along Radio Road and Davis Boulevard, with a loop on County Barn Road and Santa Barbara; costs for this improvement were estimated at \$505,349 and implementation recommended for 2025.
- Express service:
 - Along US 41 between the Government Center and Everglades City; costs for this improvement were estimated at \$446,461 and implementation recommended for 2025.
 - Along Davis Boulevard between the Government Center, airport, and Florida Gulf Coast University (Lee County); costs for this improvement were estimated at \$334,846 and implementation recommended for 2025.
- Flex service:
 - South Naples flex area; costs for this improvement were estimated at \$334,846 and implementation was recommended for 2025.

Other improvements proposed near the Study Area include new service between the CAT operations center and Creekside Transfer Station and the Collier-Lee County express service.

As of the 2018 TDP Annual Progress Report, no improvements to the fixed-route services in the area were implemented.

Map 38: 10-Year Potential Improvements for East Naples Area



Source: excerpted from the Collier Area Transit Transit Development Plan (2016-2025)

Appendix C: Online Public Survey Summary

The project included a public survey to gather input from the public on the vision, desires, and priorities for East Naples. The survey received responses from the beginning of May through the beginning of July 2020. The following summarizes findings from the survey; the total number of respondents is noted in parentheses for the question on which the information is based. The summary of findings is followed by a copy of the survey questions.

Respondent Characteristics

- 607 total respondents
- At least 300 respondents for each question, except for questions providing an option to provide additional comments as a follow-up to certain questions
- 79% are full- or part-time residents of study area (of 603 total respondents)
- 70% do not work or go to school (of 602 total respondents)
- Nearly 100% of respondents were older than 30; 60% were older than 65 (of 604 total respondents)

Common Terms to Describe the Study Area and Area of Influence Currently

When describing the area, **the most common theme** survey respondents shared was that **the area has potential, is underdeveloped and underutilized**. They view the area as critical and important with a desirable placement in the county. They also describe the study area as **inconsistent, lacking a true identity or cohesion** in the type and style of commercial and residential development. Many respondents noted the area is unattractive or felt the area could be beautified or improved to become a more desirable area within Collier County. In this vein, many respondents felt there has been **little or poor planning for the study area, poor zoning guidelines and too much of the wrong kind of development**. Respondents most noted **the study area lacks a variety of retail options, fine-dining or more upscale restaurants, and other service-oriented businesses** such as entertainment venues and hotels. Most respondents also noted the study area has too many gas stations, fast food restaurants, storage facilities, car repair and car washes. **Many also noted many vacant commercial properties that are in the study area, which they would like to see redeveloped first**. Others still noted they would like to develop and/or maintain a **local flair** to the area in spite of a desire to see more well-known brand stores as well.

More than half of respondents describe the area as a mixed area, and responses were evenly favorable and unfavorable. Some felt the area is eclectic and diverse, and attractive for tourism with leisure and recreational activities, affordable real estate and an area that is up and coming and improving and less congested than North Naples. They described the area as their community and home. Others felt the area is overdeveloped describing it as low to middle-income and felt it doesn't reflect the middle to upper middle-income residents who live or work in the study area. And others described the area as convenient and sufficient.

Some descriptions of the study area were more contradictory. Respondents both lauded the study area for its **affordability and low density**, while others felt low density was an issue and

that the study area represents a dumping ground for **low-income housing** and the **homeless** in greater Naples and Collier County. In the same manner, respondents equally described the area as overdeveloped and underdeveloped. Some described it as convenient, safe, quiet and peaceful, while others equally described it as disconnected, crowded, run down and noisy.

Of respondents who mentioned **natural resources** and **wildlife**, many felt it is a growing concern that needs to be strongly considered in the planning and development of the study area and would like to see **natural lands and habitats preserved and more parks and connected bike trails**. Some stakeholders also expressed concerns about **traffic** and **congestion** increasing in the area. Of respondents who mentioned housing, some expressed a desire not to see any more residential development in the area while others expressed a desire to see less condominium homes and fewer multi-story units.

[Common Terms to Describe the Top Three Favorite Aspects of the Study Area and Area of Influence](#)

Convenience, and easy **access to amenities and services** including the beaches, downtown and area businesses were the primary aspect survey respondents like the most about the study area. A majority of respondents also highly appreciated that the study area is **less crowded or congested** than other areas of Naples, and still has **open spaces, low density and lots of natural environment**. Many want to keep the **natural environment at the forefront of the community planning process**, and some mentioned a desire to see more landscaped medians as a beautification effort in the study area.

Many respondents also noted the **affordability** or value of the area and its safe, community feel, and the good condition of the roadway as the top reasons they like the study area. To delve deeper into the nearby amenities residents appreciate most, respondents listed parks, green spaces, sidewalks and recreational paths, golfing and the Bayshore area with its artist feel and the botanical gardens. Some respondents expressed a desire for the development of an arts center and more restaurants in the Bayshore area (which is outside of the study limits).

Some respondents expressed a desire to see **greater connectivity** throughout the study area, particularly for recreational paths. Some expressed an interest in connectivity between Sugden Regional Park to the Botanical Gardens and Bayshore CRA, and others **expressed concerns about the rise in gated communities and how those landlocked areas** make the study area less bikeable and walkable.

Some respondents noted the **diverse population** and **middle-class neighborhoods** as one of the aspects they like most about the area, and some respondents appreciated the **planned communities** such as Treviso Bay and Lely Estates. They noted the study area is friendly and supportive as well. Most respondents also mentioned the **potential growth of the area**, including its potential to attract a new mix of upscale retail and new restaurant amenities.

Common Terms to Describe a Desirable and Attainable Vision for the Future of the Study Area and Area of Influence

In describing a desirable and attainable vision for the future of the study area and area of influence most respondents mentioned a strong desire for **more mid-to-upscale restaurants, more shopping diversity and beautification.**

An ongoing theme was **controlled development**, with more of a **focus on retail and shopping and less new residential.** Respondents mentioned not wanting anymore strip malls and a **desire to see existing commercial areas modernized and brought up to date** or rezoned. One respondent mentioned permitting guidelines should be critically evaluated for long-term value rather than only short-term tax increases. Respondents also expressed a desire **to maintain the existing setbacks** and a strong concern for maintaining high standards for stormwater runoff and management. Some also mentioned retaining the **old Florida feel** to the area and ensuring that there are **affordable amenities** and entertainment venues for seniors.

Another important theme across all responses is the desire for **balance** in maintaining **low density and land preservation** with **attracting future businesses** and having more **robust commercial centers.** Some respondents would like to see **bigger box stores** in the area such as a Target or Costco and perhaps a **movie theater and post office**, while others would like to maintain a **small business feel to the community** with unique independent restaurants and retailers. Others still expressed a desire to see **mixed-use areas** like Mercato in North Naples, or concepts that have more square footage per acre with retail and restaurants on the ground floor and housing on the second and third levels.

Respondents expressed a desire to have a place where they can **live, work and shop** that is **safe, convenient, and beautiful.** Respondents also mentioned ensuring the study area is **diverse culturally and socioeconomically**, but with an effort to remove or update blighted, low-income areas. Better **public transportation, more connected non-motorized pathways and green spaces** for walking and biking continue to be a strong theme throughout responses.

Traffic management and controlling congestion was also a concern for many respondents, with one respondent suggesting widening the main roadways, and another suggesting parking garages similar to downtown Naples. Respondents also expressed a desire to see a reduction in crime and improved safety throughout the area, particularly at US 41 near Shadowlawn Drive and the Bayshore Community Redevelopment Area (mentioned in Question 8 responses).

Some respondents expressed a desire for community input to be an ongoing part of planned development for the area.

Business-Related Information

- 77% of 600 respondents visit businesses along US 41 several times a week or more, indicating that most survey takers are very familiar with this business area.
- Top 5 issues (percentage of 378 total respondents):
 - Quality (88%)

- General site/building design and aesthetics (73%)
- Mix of types (60%)
- Type (57%)
- Amount (50%)
- Other comments received related to issues with commercial businesses included the following: Respondents recommended **developing regulations to require a consistent look and aesthetic** for area businesses. They expressed a desire to **elevate and maintain the appearance of properties** and to have much needed beautification of the commercial corridors and to have more **walkable or strollable business and residential areas**. Overall, they expressed having a **strategic plan in place to guide the aesthetic vision** of the area and also a **plan to attract a diverse mix of higher-end retail and services** to the area. As part of this, some respondents mentioned a desire to have a no-high rise policy for new development.

Respondents expressed a desire to have more of an **upscale feel** to the area and suggested **first redeveloping areas with vacant commercial spaces** before allowing any new commercial development. Stakeholders suggested **providing incentives for redevelopment**, and **rezoning** areas to attract the kind of businesses desired in the community. Respondents also **suggested lowering taxes, requiring fewer fees and limiting regulations** to attract better development. However, they are concerned there should be a **scaled approach to growth and redevelopment** of the area so that as new growth is planned, there is time to evaluate and assess the growth of the area as it progresses.

While respondents strongly expressed a desire for more retail and upscale dining options and **entertainment venues**, they also want to see **unique dining concepts, owner-operated concepts and fewer chains**, particularly chain restaurants. A small group of respondents expressed a desire to attract healthy-concept restaurants and grocers and sustainable retailers to the area. They suggested establishing **microcenters with tropical vegetation and outdoor dining**, emulating 3rd Street or other areas of downtown Naples. Some also mentioned targeting retail and restaurant concepts that offer a better value than Fifth Avenue sites and coordinating with the hotels and resorts near the study area to develop a shuttle service to US 41 businesses in East Naples rather than downtown.

Respondents expressed interest in having a **Target or a Costco** as a large retailer in the area and having an **anchor business who could be a large, year-round high-wage employer**. Alternatively, some respondents expressed a desire to have a **destination mixed-use center with dining, retail and entertainment** similar to Mercato in North Naples, **but with more affordable options**. They recommended the US 41-Collier Boulevard area as a location for an anchor retailer or a mixed-used retail center. In describing these retail areas, respondents suggested having more **strict guidelines for new development** to build in a way that is more aesthetically pleasing to the end user and have more **site awareness**. Some suggestions included parking areas that do not

face the US 41 corridor, requiring businesses to better situate or plan their footprint, having outdoor dining face a retention pond rather than parking areas for example. They also mentioned increasing the availability and access to parking and incorporating design and aesthetics into those areas as well. They also would like to see **shops and restaurants more set back from US 41**.

Respondents were also concerned with possible overbuilding and how that may cause increased traffic congestion in the area. They expressed interest in having more mixed-use developments with residential and commercial components and **having more transportation options including public transportation and non-motorized pathways**. In addition, as the area continues to grow, respondents want to see **improved traffic flow, reduced congestion**, and more signalized intersections especially at entrances for large gated communities. Many expressed a desire to **maintain greenspace**, whether that be requiring more stringent setbacks for businesses along the US 41 corridor or having more landscaping to soften the structures and generally make business corridors more attractive from the roadway. **Land preservation** and very **controlled development** was also an undertone of these comments with bicycle and pedestrian access and more green pathways and recreational lands.

Respondents also expressed a concern regarding low-income neighborhoods and **no longer allowing development of low-income housing** in the area and establishing a plan to phase out existing trailer park communities.

Other comments included establishing a business improvement district and having **one website representing** all of the businesses in **the study area**, bringing a **charter school to East Naples**, and a **post office** to the area, as well as a fitness center and a lighted dog park.

- Ranking of businesses identified as desirable during the 2018 US 41 Corridor Study (based on 368 respondents)
 - Restaurants
 - Stores for goods (e.g., clothing store, hardware store)
 - Cafes/coffee shops
 - Grocery Stores
 - Stores/offices for services (e.g., dentist, salon)
 - Business/retail on same site as residences (e.g., mixed-use, live/work units)
 - Hotels/motels
 - Other common themes from additional comments: More than 170 respondents shared other preferences for the type of retail or business. Some shared that they would like to see more **walkable retail areas** and would like to see a **balance between large chains and small, local companies and community needs**. Many suggested mid- to high-end **elder housing and healthcare services**, and strong employers such as **research and development companies**. Respondents expressed an interest in seeing unique concepts like a **progressive eatery & market** or food hall similar to the Timeout market in Miami.

Respondents expressed a desire to see more **parks and preserves** or more **small retail businesses** and cafes that have quiet, **green outside eating areas**.

Respondents also expressed interest in a **specialty garden center** such as Driftwood Nursery.

Respondents expressed a desire for a **large or small open mall concept** like Mercato or Vanderbilt Shoppes in North Naples as well as a **wholesale store** such as Target, BJ's Wholesale, Costco, or Sam's Club.

Other concepts respondents favored included **specialty stores** with unique offerings including **specialty food shops**, butcher shop, bakery, seafood shop, gift shops, artist studios, doggy day care and couture shops.

Areas for entertainment were also strongly favored including **sports entertainment centers**, such as a driving range or bowling alley, sporting goods stores or sports bar. Respondents also voiced interest in **family-oriented entertainment centers**, a **more modern movie theater**, or indoor activity center, such as Sky Zone, or art venues.

Nightlife was also a theme with respondents expressing interest in **nightclubs**, **music venues**, **pool halls**, a playhouse, a comedy club, brewpubs and wineries.

Fitness-oriented businesses were also favored by respondents including gym services and fitness concepts such as a cycling center.

Other concepts respondents mentioned included a **book store**, a community center for afterschool care and organized youth sports such as a YMCA, upscale spa, preschool recreational facilities, private schools, clubs, museums, art galleries, performing arts center, and artistic workshops including glass blowing, jewelry making or pottery shops. Some respondents mentioned liquor stores and casino gambling centers.

Respondents called out **specific well-known retailers** they would like to see in the study area including Home Goods, Bed Bath & Beyond, Ikea, Crate & Barrel, Burlington Coat Factory, Talbots, Barnes & Noble, Whole Foods or Trader Joe's, or local concept Food & Thought and Oakes Farm Market.

Many respondents reiterated their interest in **higher-end restaurant chains** suggesting well-known brands including, Seasons 52, Brio Tuscan Grille, Cheesecake Factory, and Ruth's Chris Steakhouse.

- Preferred locations to evaluate for new business opportunities (based on 339 total respondents)
 - 58% of respondents indicated a preference for US 41
 - 42% of respondents indicated a preference for the Activity center at US 41 and Collier Boulevard
 - 40% of respondents indicated a preference for Collier Boulevard
 - 34% indicated a preference for the Activity Center at US 41 and Rattlesnake Hammock Road

- Site preferences
 - 65% of 371 total respondents preferred parking once in a walkable cluster of establishments and walking between them; walkable concepts, such as an open mall, were also highlighted in comments about business issues.
 - As mentioned previously in this section, additional comments throughout the survey indicated a preference for controlled development that ensures land preservation and green space.
- Preferred Strategies to Increase Desired Businesses (based on 349 respondents)
 - Note that this question allowed only one strategy to be chosen; no strategy had a majority share of support, but top supported strategies included:
 - Marketing campaign to attract new desired businesses (24% of respondents)
 - Incentivize new desired businesses through expedited permitting (20% of respondents)
 - Incentivize new desired businesses through fee reductions/waivers (12%)
 - Nearly 14% of respondents did not support any options to increase new desired commercial uses in the Study Area.
 - The additional comments indicated that several respondents would have preferred to choose more than one option.
 - Other comments are summarized as follows: **Quality of life** for the residents and the **visual appearance** of the community and roadways remains a common theme in respondents' comments. Also, of critical importance is **fostering controlled growth while limiting any increase in traffic and maintaining a quality to the design and construction** of new developments.

Some respondents felt very **little new commercial development is needed** in the study area. Some said they were more in support of **mixed-use developments** with park space, or **streetscapes** like in segments of Tamiami Trail North. Some felt mixed-use developments would be helpful in balancing high-end housing for residents in these new communities in East Naples with housing options that are affordable for the service workers who will work in the restaurants and shops the higher-end communities desire. Others echoed that any new planned development should be balanced by efforts to **protect green space and the natural aesthetics** of the area.

Many supported all or most of the suggested incentives, but some said that **incentives should only be offered to types of businesses that are most desired** by the community. Some felt that marketing and any incentives should go hand-in-hand. Many respondents felt **significant marketing efforts**, especially marketing the study area as a place where year-round residents live, would go a long way to help attract a better mix of businesses. Part of this would be **rebranding the name** East Naples to another name, and one stakeholder

suggested Naples Bay or South Naples or SoNo or Naples East Township. Some **supported expedited permitting** while others were **not in support of fee reductions, waivers or adjustments to lot depths**. Another respondent suggested enforcing and updating zoning laws. Yet another suggested temporary tax breaks of 3 to 5 years for businesses that are opening in existing vacant storefronts. Some respondents felt that design reductions or waivers may result in a substandard look and decrease overall values in relationship to other areas of Naples. With any of the incentive options listed in the survey, respondents felt **strong oversight was needed and a streamlined process in place for any new development**.

One respondent supported commercial growth but only in Zone 2 – the existing activity center outlined in the County Growth Management Plan. Another respondent felt that it depends on which centers/zones are the focus, where if the area of focus is only the US 41 corridor mixed-use development would be desired. One respondent suggested marketing to draw new businesses by using demographic data including residential housing and income values especially near Zones 2 and 3, which are both existing activity centers outlined in the County Growth Management Plan.

Some respondents expressed that the plan and survey seem to be set up more as a commercial development plan than a land use plan. Another felt that meeting the commercial benchmark of 12 percent to 15 percent similar to the rest of the county is an assumption about East Naples, which is more unique, and those numbers may not be true of the study area.

Transportation

- 56% of respondents indicated that US 41 and other major roadways are important thoroughfares for automobile traffic, but some compromises are necessary to improve other ways of traveling (such as biking, walking, and/or transit) and access to places along the corridors (based on 332 responses about US 41 and 329 responses about other major thoroughfares).
- Additional comments in the survey indicated a preference for the following:
 - Transportation options and walkability
 - Improved traffic flow and lower congestion

Areas Outside the US 41 Corridor

- Top three issues based on 344 respondents:
 - Amount of traffic (47% of respondents)
 - General design and aesthetics (42% of respondents)
 - Type of development (34% of respondents)
- Comments on questions related to this topic echoed many of the themes seen elsewhere in the survey responses:

- Limit undesired uses
 - Beautification
 - Concerns of overdevelopment
 - More green space and parks
 - Manage traffic and promote more non-motorized paths
- The comments are summarized in more detail as follows: Respondents shared there are too **many undesired businesses** in the study area, and more thought needs to be given to the type and mix of businesses for a cohesive plan. Respondents communicated that there is a **significant need for regulated and organized beautification efforts** of both new and older commercial and residential areas. In particular, they felt beautification of the building aesthetics and landscaping should be a priority. Respondents are concerned about the long-term poor image of East Naples and feel rebranding should be a priority. Many are concerned and wary of **overdevelopment** and want to make sure low density remains a priority as the study area continues to grow.

Some respondents felt there is a **significant need for more green space and parks**, including a lighted dog park. One respondent felt it would be ideal if a **park could be developed abutting a microcenter** of shopping with a café and retail options.

Some respondents expressed desire to have **alternative traffic control devices** other than signalized intersections with wide intersections and dedicated turn lanes. Some feel that **more signalized intersections or other traffic control devices are needed** to help maintain the flow of traffic. In particular, one respondent noted heavy traffic congestion at the Triangle Boulevard and US 41 intersection as well as the Triangle Boulevard and Collier Boulevard intersection. Other respondents expressed a desire to have **more biking and walking paths**.

Some other issues of note include **using Saint Andrews Boulevard**, a residential road through Lely Estates, **as a cut-through** to get to US 41 from Santa Barbara Boulevard. Respondents feel greater traffic enforcement, or another solution is needed to discourage cut-through traffic. One respondent expressed concerns about **pedestrian and bicycle traffic safety** when crossing the intersections at US 41 and Rattlesnake-Hammock Road and US 41 and Thomasson Drive. Another echoed that marked crosswalks are of limited value because turning vehicles don't see bicyclists and/or pedestrians in the crosswalks, and would like to see an option for designated "safer" centralized crossing areas and routes/trails that lead to those crosswalks.

Some respondents feel there is too much **housing development and that it is outpacing roadway planning** to meet the demand of new residents using the roadways. Also, some respondents feel **non-motorized pathways need to be improved**. In addition, some respondents felt strongly that setbacks should not be reduced, to help with stormwater absorption. Another respondent mentioned that Hawaii Boulevard floods frequently during heavy rains and that the neighborhood needs better drainage.

Public Facilities and Services

More Satisfactory	Middle	More Unsatisfactory
Fire Service	Parks	Non-Automobile Pathways
Roadways	Schools	
Libraries	Housing Affordability	
Police Service		
Emergency Services		

(Based on 300+ responses)

General Survey Comments

More than 70 respondents shared additional comments about the preliminary project findings. Many echoed early statements regarding **discouraging low-income housing, undesired businesses** and limiting rental complexes mentioned early in the report. Others echoed **filling up or attracting new businesses for the vacant commercial centers** and ensuring a new type of business mix other than storage units and gas stations. Two respondents noted a need to **maintain housing that is affordable** in the area and commented it should be along the US 41 corridor.

Some stated that there are homeowners in the HOA communities within the study area who would support the higher quality retail, services and hospitality businesses that could be developed in the study area.

Some respondents continued to voice concerns about the need to enhance green space requirements for new **developments** so that abundant landscaping is required. A part of this is a serious **concern of overcrowding and overdevelopment** as they feel areas of North Naples are overdeveloped. Many feel that development should not infringe upon **natural lands and wildlife habitats** as the open green spaces are a major draw for many to the study area and area of influence. Respondents also felt, especially with the older population in the study area, that **activity centers need to be accessible for citizens with mobility issues and should be open enough to be walkable or bikeable**.

Some respondents continued to lobby for **more green space, parks and walking trails in the study area**. Others felt that **traffic patterns and planning** needed to be looked more closely to reduce future traffic congestion as the area grows, as well as plans to **increase pathways and safety for pedestrians and cyclists**. Other respondents requested more shade trees rather than palm trees.

Timing of the signalized intersections, particularly along US 41 at Collier Boulevard, Rattlesnake-Hammock Road, Lakewood Boulevard, and Airport-Pulling Road need to be re-evaluated.

Respondents suggested **renaming the area from East Naples to another alternative**. Some respondents suggested **South Naples**. Many respondents feel that with its proximity to downtown and the beaches, they area could develop very well with careful planning.

One respondent lobbied for the development of an **advisory board to help guide the community development and planning process**. Another respondent strongly suggested a fitness facility and another requested improved landscaping for the center island at Thomasson Drive.

Outside of the study area, respondents felt that the Arts District and the triangle at Davis Boulevard and US 41 need to be further developed.

Some respondents wanted more information regarding how the study can be expedited and wanted to know what the timeline is to begin implementing the plan as well as next steps.



East Naples Community Development Plan Survey

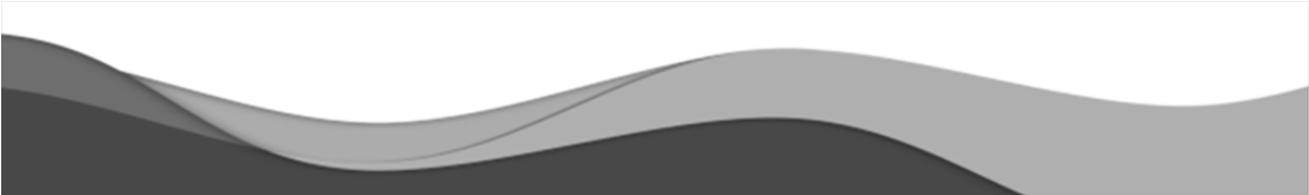
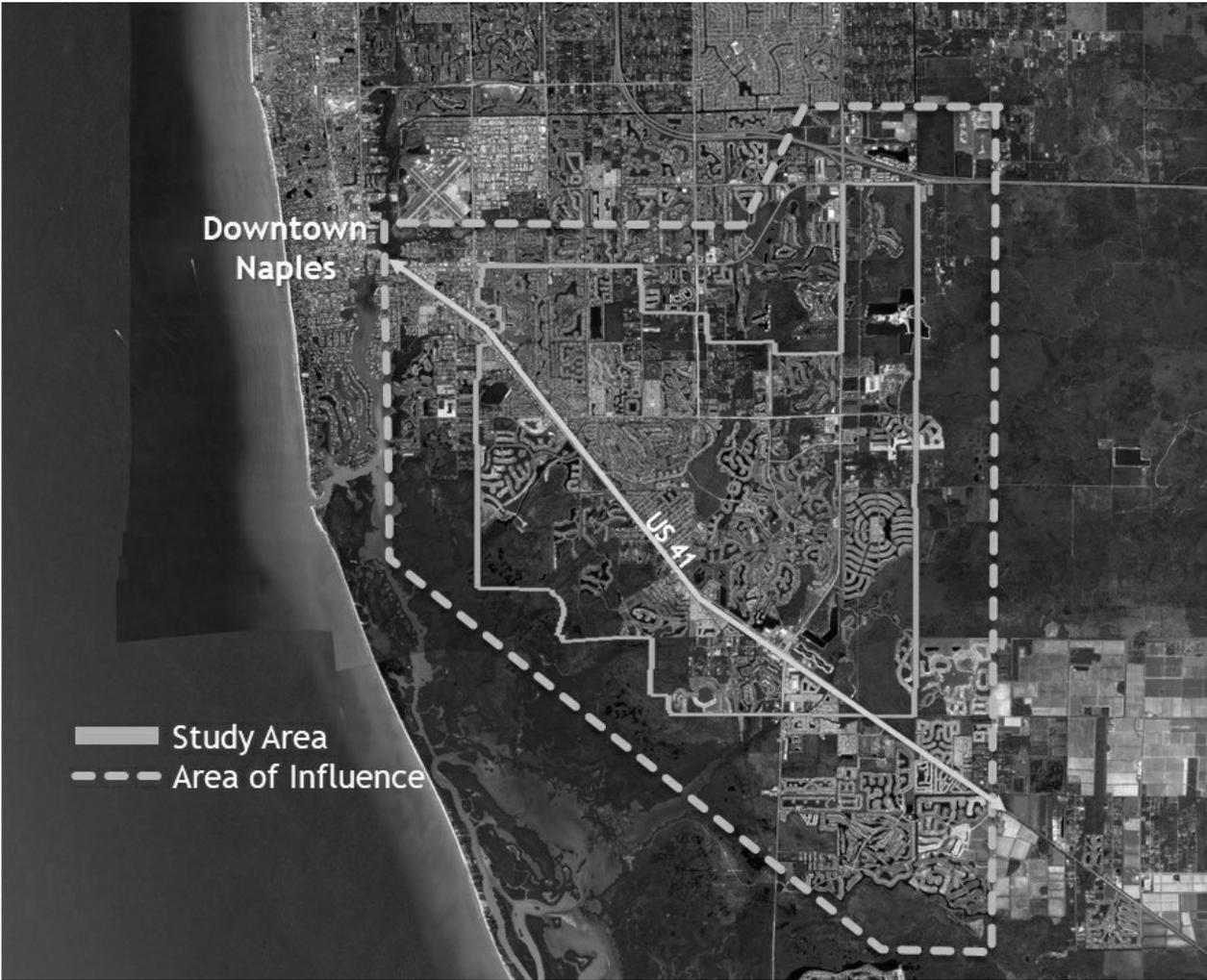
Collier County is working with the East Naples community and consultants from Tindale Oliver to create a Community Development Plan for the East Naples study area (see map below). A US 41 Corridor Study completed in 2018 included public outreach for communities along the US 41 Corridor in this area and provided a set of recommendations. The East Naples Community Development Plan will build on these recommendations and those of other relevant studies (e.g., local transportation plans) to provide more detailed options to guide future land uses and development.

You can check out some preliminary findings and a suggested project approach from the project team [here](#).

The following questions gather additional information and feedback related to these findings. All 25 questions are voluntary; you can also share general comments and questions at the end of the survey.

If you need immediate assistance or would like to join the project email list to receive notifications on project events and updates, you can email us at ENCDDP@colliercountyfl.gov. You can also visit the project webpage for more information: <http://colliercountyfl.gov/EastNaplesCDP>.

Thank you for your input!



East Naples Community Development Plan Survey

Tell Us a Bit About Yourself

The following questions help us understand your relationship to the study area and area of influence for the plan.



1. Which area below best describes where you live?

- Within the study area (full-time or part-time)
- Within the area of influence but outside the study area (full-time or part-time)
- Outside the study area and the area of influence, but within Collier County (full-time or part-time)
- I have no full-time or part-time place of residence in Collier County.

2. Which area below best describes where you work or go to school:

- Within the study area
- Within the area of influence but outside the study area
- Outside the study area and the area of influence, but within Collier County
- Outside of Collier County
- I do not work or go to school.

3. What is your age?

- Younger than 18
- 18-30
- 31-65
- Older than 65

4. If you do not live and/or work in the study area, which of the options below best describes how frequently you visit the study area?

- Several times a week or more
- A few times a month
- A few times a year or less
- I do not visit the study area.
- Not applicable - I live and/or work in the area.

5. Which of the options below best describes how often you visit businesses along US 41?

- Several times a week or more
- A few times a month
- A few times a year or less
- I do not visit businesses along US 41.

6. Which of the options below best describes how often you travel along US 41 to get to/from work/school?

- Several times a week or more
- A few times a month
- A few times a year or less
- I do not use US 41 to get to/from work/school.

East Naples Community Development Plan Survey

What Does this Area Mean to You? A Vision for the Future.

The following questions help us gather fundamental ideas and language used to describe the study area and surroundings currently, as well as what makes the area great now and in the future. These responses will provide a basis for a general vision for the area.



7. What top three words/terms would you use to describe the study area and area of influence?

1st:

2nd:

3rd:

Other Comments:

8. What are the top three aspects of the study area and area of influence that you like the most?

1st:

2nd:

3rd:

Other Comments:

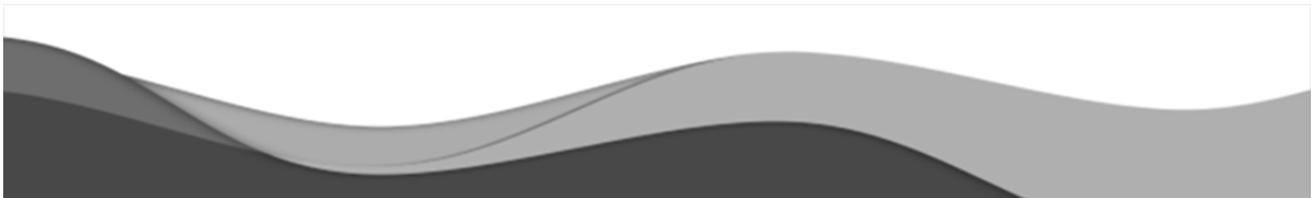
9. What are three terms you would use to describe a desirable and attainable vision for the future of the study area and area of influence?

1st:

2nd:

3rd:

Other Comments:



East Naples Community Development Plan Survey

Business and Retail

Findings from the US 41 Corridor Study indicated that participants wanted expanded commercial offerings and less storage and gas station uses. We'd like to gather some additional information for more detailed land use and development options in the East Naples Development Plan.



10. What are the top 5 issues to address in terms of businesses (e.g., restaurants, shops, cafes, etc.) in the study area and its surrounding area of influence?

- Amount
- Type
- Mix of types
- Access, including transit and non-motorized access
- Quality
- Affordability
- Parking availability/access
- General site/building design and aesthetics
- I don't think there are any issues with businesses in the study area or area of influence.
- Other (please specify)

11. Please provide any additional comments to explain your choices from question 10.

12. Rank the following options below in terms of business and retail types to encourage in the study area and area of influence (1 being MOST preferred and 7 being LEAST preferred option; note that you can drag and drop options into your preferred order).



Cafes/coffees shops



Grocery stores



Hotels/motels



Restaurants



Stores for goods (e.g., clothing store, hardware store)



Stores/offices for services (e.g., dentist, salon)

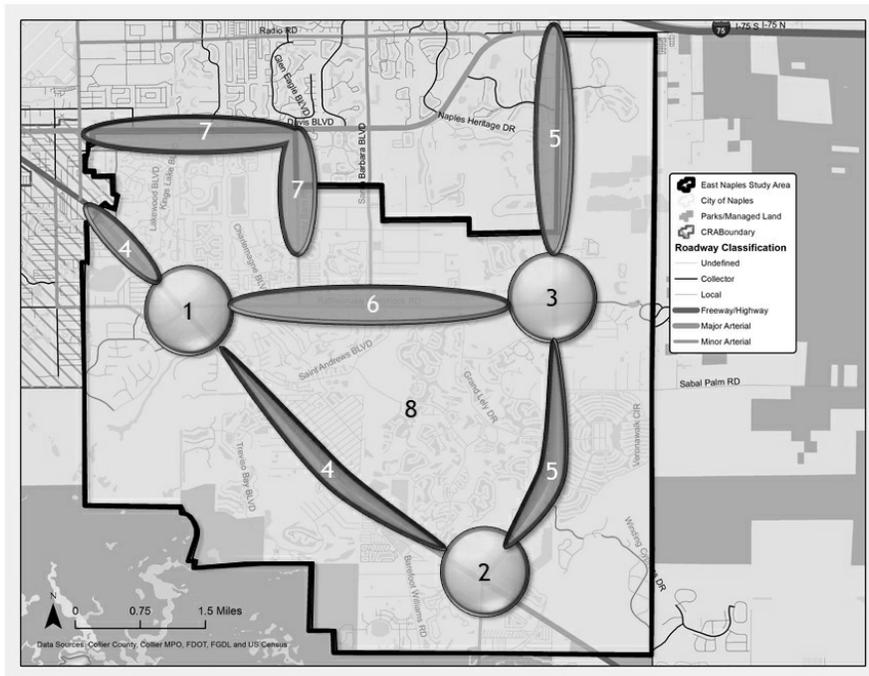


Business/retail on the same site as residences (e.g., mixed-use, live/work units)

13. Regarding question 12 above, are there other business and/or retail preferences you would like to tell us about?

14. Which option below best describes your preferences for accessing retail?

- Park in front of each retail establishment without having to walk between establishments. This option provides visible, convenient parking at the front of each establishment; larger parking lots may be required fronting the roadways and may make storefronts less visible from the roadway.
- Park behind each retail establishment without having to walk between establishments. This option allows for store fronts to be more visible along the roadway; larger parking lots may be required and may not be as visible from the roadway.
- Park once in a walkable cluster of establishments and walk between establishments. This option may allow for shared parking and parking garages that may take up less land and may allow for storefronts to be more visible along the roadways; visitors may rely more on physical activity such as walking to move to and between establishments.
- Access establishments by methods other than a personal car, such as transit, walking, or biking. This option may provide more access choices and allow for smaller parking lots and more visible storefronts along the roadway; visitors may rely more on physical activity to access transit and/or an establishment.
- Other (please specify)



-  Activity Centers
-  Major Corridors
-  Residential

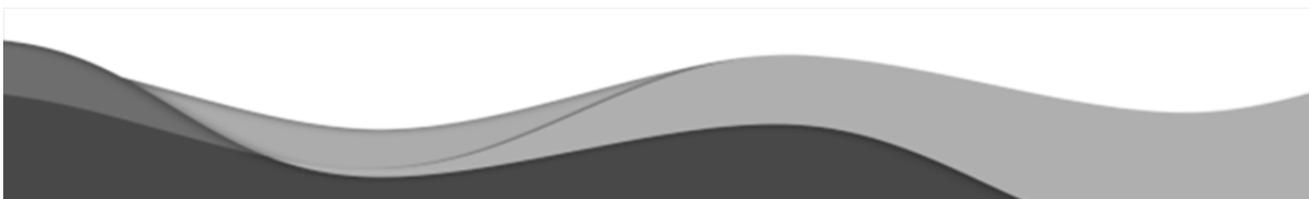
15. Which of the zones (1-8) shown in the map above would you like the project team to review for opportunities for additional desired commercial uses? (Choose all that apply.)

- Zone 1: Existing Activity Center designated in County Growth Management Plan
- Zone 2: Existing Activity Center designated in County Growth Management Plan
- Zone 3: Existing Activity Center designated in County Growth Management Plan
- Zone 4: Major Corridor – US 41
- Zone 5: Major Corridor – Collier Blvd
- Zone 6: Major Corridor- Rattlesnake Hammock Rd
- Zone 7: Major Corridor-Davis Boulevard and County Barn Rd
- Zone 8: Existing primarily residential areas

16. Which, if any, of the following options would you support to achieve an increase in desired commercial uses in the Study Area?

- Create a marketing campaign to attract new desired businesses to the Study Area
- Incentivize new desired businesses through flexible site design requirements
- Incentivize new desired businesses through an expedited permitting process
- Incentivize new desired businesses through development fee reductions or waivers
- Evaluate and increase the amount of commercial development allowed on sites
- Allow and encourage adjustments to commercial lot depths along the major roadways
- Evaluate and increase the amount of residential allowed on sites to increase potential customers in the area for local businesses
- I do not support any options to increase these commercial uses in the Study Area.
- Other (please specify)

17. Please provide any additional comments to explain your choices from the previous question.



East Naples Community Development Plan Survey

Areas Outside of US 41 Corridor



18. For parts of the study area and area of influence that are NOT along the US 41 corridor, what are the top 3, if any, issues?

- Amount of traffic
- Traffic speed is too slow
- Traffic speed is too fast
- Roadway connectivity and access to destinations
- Non-motorized connectivity (e.g., connections for walking and biking) and access to destinations
- Type of development
- Mix of development
- Coverage or quality of community facilities (e.g., parks, community centers)
- Performance of infrastructure (e.g., drainage)
- General design and aesthetics
- Landscaping
- There are no issues in the study area and area of influence NOT along the US 41 corridor.
- Other (please specify)

19. Please provide any additional comments to explain your choices from the previous question.

Transportation

Please refer to the map below for questions 18 and 19.



20. Which statement below best reflects your vision for US 41 in the study area?

- US 41 should be optimized for all automobile traffic, including minimizing travel time for as many automobiles as possible, even if this makes other methods of travel such as walking and biking more difficult.
- US 41 is an important thoroughfare for automobile traffic, but some compromises are necessary to improve other ways of traveling (such as biking, walking, and/or transit) and access to places along the corridor.
- Appropriate development intensity and mix to promote walking, access to properties, and local connectivity should be prioritized along US 41; minimizing automobile traffic and travel time along these roadways is less important.
- Other (please specify)

21. Which statement below best reflects your vision for major roadways aside from US 41 in the study area?

- These major roadways should be optimized for all automobile traffic, including minimizing travel time for as many automobiles as possible, even if this makes other methods of travel such as walking and biking more difficult.
- These major roadways are important thoroughfares for automobile traffic, but some compromises are necessary to improve other ways of traveling (such as biking, walking, and/or transit) and access to places along the corridor.
- Appropriate development intensity and mix to promote walking, access to properties, and local connectivity should be prioritized along these major roadways; minimizing automobile traffic and travel time along these roadways is less important.
- Other (please specify)

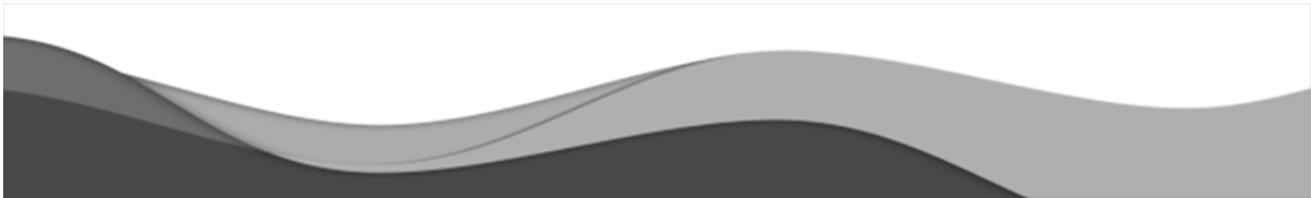
Facilities and Services

22. Which, if any, of the following publicly provided or supported facilities and services do you think are provided at a SATISFACTORY level in the study area and area of influence? (Choose all that apply.)

- Roadways
- Non-automobile pathways (example: sidewalks, trails)
- Libraries
- Parks
- Schools
- Fire service
- Police service
- Emergency Services (such as those responding to a medical emergency)
- Housing affordability
- All of the above
- None of the above
- Other (please specify)

23. Which, if any, of the following public facilities and services do you think are provided at an UNSATISFACTORY level in the study area and area of influence? (Choose all that apply.)

- Roadways
- Non-automobile pathways (example: sidewalks, trails)
- Libraries
- Parks
- Schools
- Fire service
- Police service
- Emergency Services (such as those responding to a medical emergency)
- Housing affordability
- All of the above
- None of the above
- Other (please specify)





East Naples Community Development Plan Survey

Additional Comments and Contact

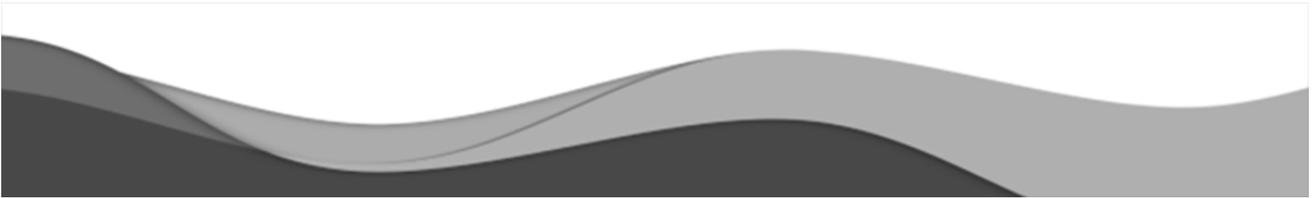
24. Are there any additional comments you would like to add related to the preliminary project findings and approach that you can view again here? Any additional general comments?

25. If you would like to join the project email list to receive notifications of upcoming project events and postings to the project webpage, please fill out the blanks below.

Name:

Organization (optional):

Email:



Appendix D: Workshop 1 Recap

A public workshop was held June 29, 2020, providing the ability to participate either in-person at the Collier Board of County Commission Chambers or via an online platform. The workshop had over 90 participants. A brief presentation was made to the participants, then the project team discussed questions and comments submitted by participants for the remainder of the workshop. For questions and comments not addressed directly during the discussion period, a follow-up recap of submitted questions/comments and responses from the project team was created. This recap is provided in the remainder of this appendix.

EAST NAPLES

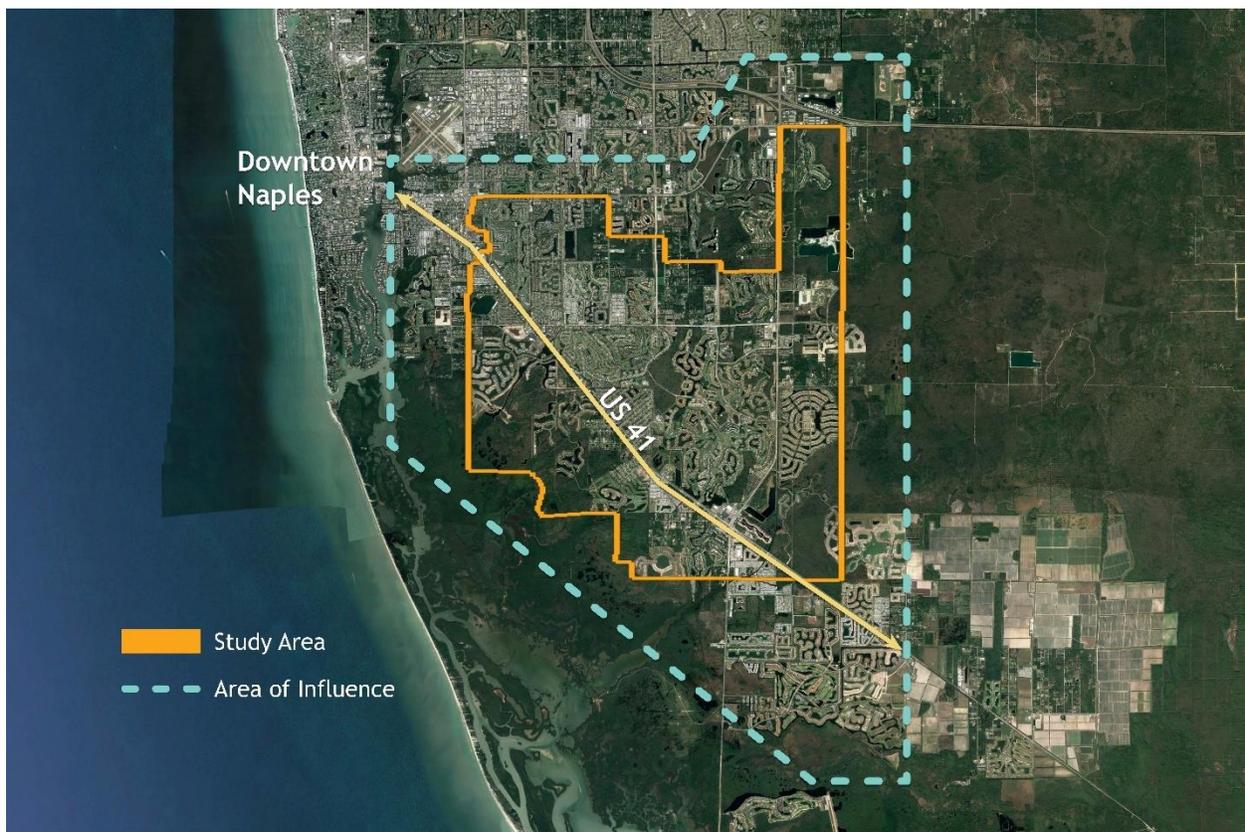
COMMUNITY DEVELOPMENT PLAN

Public Workshop 1: Response to Comments and Questions

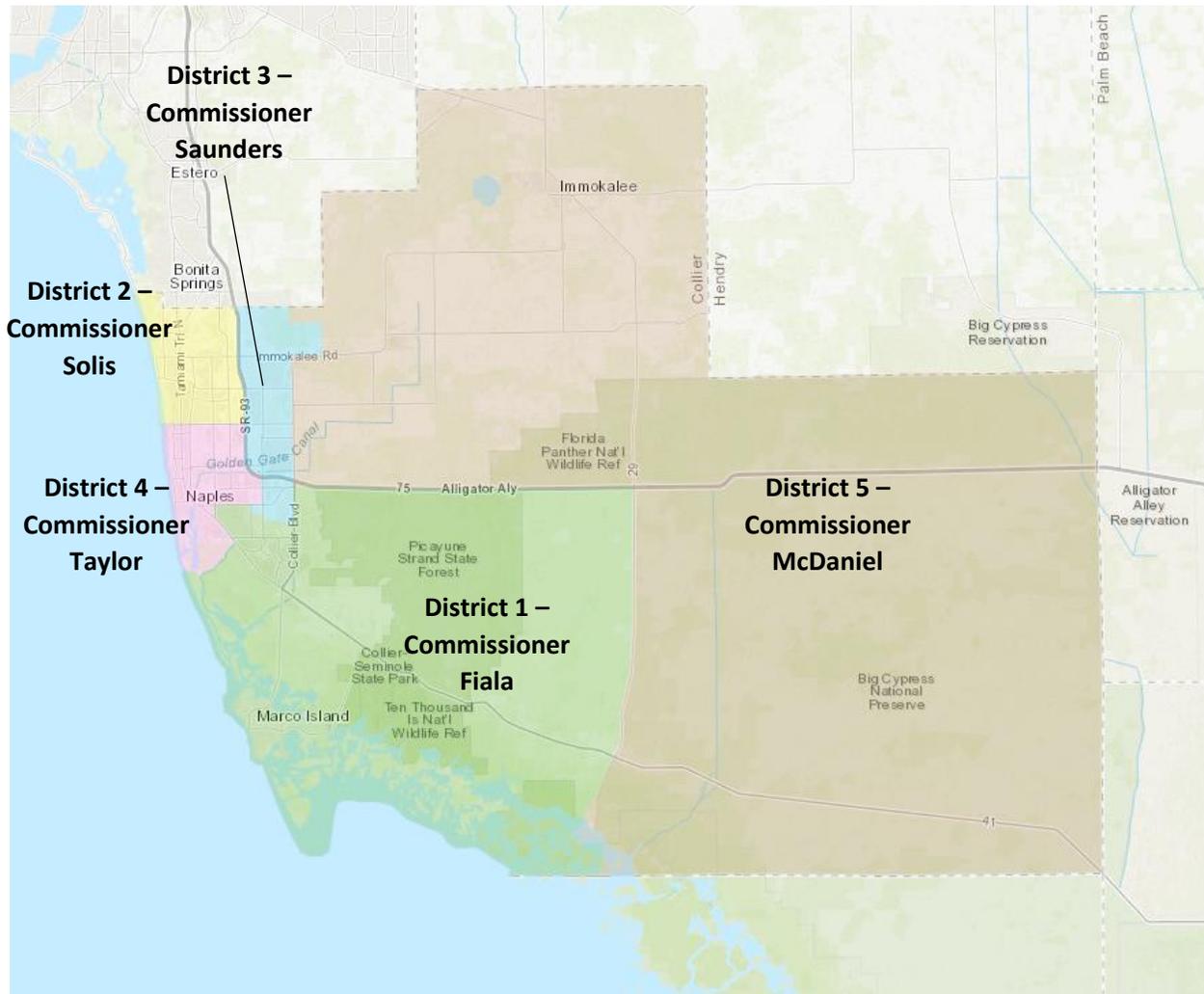
Thank you to everyone who joined us for the East Naples Community Development Plan public workshop held June 29, 2020! The following summarizes comments and questions received during event, along with responses from the project team. We will incorporate this input as we move forward with the next stages of the project.

Project Study Area

Project Study Area & Area of Influence Map



Collier County Commissioner Districts Map



Comments/questions on the Study Area boundary:

- **What guided the study boundary? Was it Zoning/FLU?**
- **Why does the northern boundary of the study area exclude the area between County Barn and 951?**
- **Davis Boulevard is a natural boundary without regard to arbitrary district boundary. Development should be focused on serving people without regard to political boundaries.**

The Study Area for this project (shown above) is used to run data and spatial analysis and was primarily informed by the District 1 boundaries with some adjustments for land use and roadway patterns; we are also looking at the surrounding area to account for major developments, improvements project, and other factors outside the Study Area that may influence the project. We anticipate that this plan will provide analysis, approaches, and recommendation options that can be referenced and easily adjusted for use by other areas in East Naples and the unincorporated county given many of the similar issues and land use/roadway patterns in these areas.

Is this webinar strictly concerning the US 41 corridor?

Part of the webinar covered information primarily relating to the US 41 Corridor, including a 2018 study focused on the corridor and possible opportunities for commercial development/redevelopment which are primarily located along this corridor. However, our project focus area and outreach includes surrounding areas and other major thoroughfares, so we are conducting analysis and gathering feedback on those points, as well. See the project study area map shown above.

Other areas mentioned for consideration:

- **Does the study include Marco Island with East Naples? The commercial needs for East Naples will also serve Marco residents.**
- **Also take into consideration to North Naples. Having commercial businesses that are only there presently creates an inordinate amount of traffic, particularly during peak season. There would be significant decrease in overcrowded roads if some of the commercial businesses have a presence in East/South Naples.**
- **Your developer input seemed to have concern about a lack of density. But there is tremendous additional population around the eastern area within a short drive. Would highlighting the areas of Winding Cypress, Collier Preserve, Reflection Lakes, Fiddler's Creek, etc. help make development more desirable? These developments are already online and expanding.**

We will account for how surrounding areas influence the Study Area, as mentioned above. Part of the consideration of how surrounding areas support existing retail in the Study Area or in other locations and how they may support any new retail that may be built relates to market demand dynamics; this plan will not include an in-depth market analysis, but as noted in the comments above, we have talked with members of the development community to get a general sense of what may be feasible for the area.

Vision & Branding

So far, I am not seeing anything that indicates a vision to a design for improving the area; the project is just going to move along with some minor improvements.

This first stage of the project really aims to identify or validate the existing understanding of what needs to be done in the area and establishing some foundational ideas to create forward-looking development concepts with renderings and options for an implementation program in the second half of this project.

Comments/questions on specific marketing/branding ideas:

- **There is a negative perception of East Naples, and there is a desire to rebrand the area, particularly in terms of the name; "South Naples" is an example of a possible rebrand [Several comments mention a desire to rebrand the area with a new name, although one comment indicated a desire not to rebrand].**
- **Rebrand the area and signage based on the existing built and natural environment; an example of a new name for the US 41 corridor is the Naples Everglades Trail as a connection of Fifth Avenue and the Beaches with the Everglades, Fatahatchee Strand, Big Cypress, Rookery Bay with a Collier County History Museum in between; there are also the blossoming Bayshore Arts District with the Botanical Garden, the Wang Center and the Bayshore Gateway**

Triangle Redevelopment Area 17-acre development yet to come, as well as parks: Sugden, Donna Fiala, East Naples, and Bayview.

- **What do you have in mind for a marketing agenda?**

We will document the issue of branding and marketing in our report, provide some foundational vision themes and land use concepts that can serve as a basis for more specific future branding and marketing efforts, and note some high-level guidance for these future efforts; this information will be developed in the second half of the project and presented at the next public meeting.

Please don't make East Naples as crowded as Florida's East Coast.

Concerns of overbuilding and overcrowding were key themes emerging from the initial survey responses, aligning with this particular comment. We will take this theme into account as we develop land use concepts for the area for review and feedback at the next public meeting and related online public engagement.

Land Use & Development

Comments related to attracting additional commercial development:

- **Please explain if commercial is already at 11% and 7% is not being used, why would we want to increase to 15%? I may not be reading this correctly but there is a lot of commercial buildings that are not in use up and down the 41 corridor. This is an eyesore on the community surrounding.**
- **Why would the Board allow more commercial development when we have so many commercial areas that are not viable? Case in point is the Outlet Center on 951, and up and down 41 there are empty store which are just an eyesore on the community that surround them.**

We have noted an estimated vacancy rate for existing commercial properties (7%), as well as the share of non-residential square footage built of total square footage built during the last decade (11%). Since 11% is lower than the 15% we observe elsewhere in similar parts of the county, we are showing that this area is underserved from what we might expect based on similar areas. The 7% vacancy rate in existing structures indicates the area is further underserved since these vacancies are not accounted for in the building square footage measures.

We hope our analysis shows some benchmarks that may be useful to think about the current amount of existing commercial and some potential feasible approaches to attracting more desirable uses, yet this analysis is merely a starting point for discussion. In addition to attracting tenants for vacancies in existing buildings, approaches include encouraging building on vacant lots or redevelopment of existing lots that are already targeted for commercial uses. These approaches do not have to include any increases in intensity from what is already allowed, yet increased allowances could be reviewed as a way to attract development in locations where the current allowances may be a constraining factor to developing or redeveloping existing sites. In this regard, we are relying on community comments and survey input to indicate the degree of additional commercial desired to help inform the ultimate approach to pursue; preliminary comment and survey results did not indicate a strong preference for pursuing approaches that involved increases in allowed commercial development.

A lot of businesses went out of business in the area. Big box stores have a colder character and are not very homey; boutique and mom-and-pop stores are nicer.

Many survey responses indicated a preference for functional and anchor retailers as well as smaller local businesses; the project team can account for these different types of retail and what approaches might help make them sustainable in the area.

What to do about updating older housing stock, including older condos?

In most instances, we rely on the market to address the redevelopment of housing units, particularly for multi-family. If land supply is constrained and/or the older housing provides a geographic advantage, developers will reinvest in an area. If there is a lot of new housing being built with similar access to jobs/amenities, reinvestment may take much longer. Grant programs are available through the Community and Human Services Department.

Questions related to the Bayshore Gateway Triangle Community Redevelopment Area Plan:

- **There was a plan to put in a cultural center off Bayshore Drive. Any update?**
- **What is happening to the land at Davis and 41?**
- **The area along Davis Boulevard and US 41 from the Triangle area heading east has unattractive strip malls. Any plans for those specifically?**

Plans for the areas along Bayshore Drive and Davis Boulevard/US 41 are addressed in the recently updated Bayshore Gateway Triangle Community Redevelopment Area Plan; you can get more information about this area and current efforts on the redevelopment area website: <https://bayshorecra.com/>.

For strip malls and strip commercial along US 41 east of the redevelopment area, the East Naples Community Development Plan will provide land use concepts to help guide redevelopment of sites such as those along US 41 in the future.

Is there not data that says unkept commercial properties are more apt to fail than those with a reasonable management that constantly improves the property?

Activating vacant lots and support for upkeep and beautification of properties are commonly included in approaches to redevelopment and stimulating local economic activity. One example is façade improvement programs, which are often used in redevelopment areas and business districts. Research on façade improvements based on outreach to a selection of downtown businesses in Wisconsin suggests that the businesses perceived some economic benefits after making façade investments (<https://fyi.extension.wisc.edu/resilientdowntowns/files/2016/06/Final-Report.pdf>), although note that many factors can affect the economic performance of an individual business or area.

Based on the preliminary findings presented, are there specific businesses being targeted for marketing a presence in East Naples?

In terms of desired uses, regulations and incentives will likely focus on general categories that capture these desired uses; future marketing efforts that build on this plan may be an opportunity to target specific businesses and retailers mentioned in comments and survey responses.

Have there been any large year-round employers that have expressed interest in establishing headquarters or office space in the study area or area of influence?

In addition to retailers, such as, HomeGoods, Burlington Coat Factory, etc., an Amazon Distribution Center will be locating to the East Naples area.

Comments on green spaces in the community:

- **Need to have more open space and public golf courses as most come here to enjoy the outdoors.**
- **Consider East Naples Community Park for the activity center at the Rattlesnake Hammock and 41 intersection.**

Having ample green space was a key theme emerging in general from the initial survey results, aligning with these comments. This point will be considered as we are developing recommendations in the second half of this project.

What is meant by Activity Center at [US 41 intersections with] Rattlesnake Hammock Road and Collier Boulevards. Would that be a casino?

Activity Centers are areas formally designated in the County’s Growth Management Plan that are intended for more commercial intensity and mixed-use allowances relative to areas such as single-family residential neighborhoods. Preliminary survey results indicated that these are areas the project team should further evaluate for opportunities for desired commercial uses identified from the 2018 US 41 Corridor Study and further prioritized through preliminary survey results for this current planning effort. While casinos are not explicitly part of the list of desired uses we identified from the 2018 study findings, entertainment and nightlife uses were mentioned in the comments from our current survey efforts.

Any plans to purchase the Riviera Golf Club?

There have not been any discussions at this time to purchase the Riviera Golf Club.

Add car washes to the list of undesirable uses.

The project team will note this use as it looks at strategies for limiting undesirable uses in the second half of this project.

The gas station on US 41 broken down from Hurricane Irma still there! I asked about last year and was told it was waiting on permits. What's going on?

These comments have been referred to the County’s Code Enforcement Division.

Why is a storage unit being built on US 41 next to CVS just east of Collier when residents made it very clear we did not want one?

Storage units have clearly been identified as an undesirable use, and a proposed amendment to the Land Development Code is under consideration to address concerns with self-storage uses by allowing these uses in C-4 commercial districts only in combination with other permitted uses as part of a mixed-use development and if it occupies less than 50% of the total area of the first floor. The East Naples

Community Development Plan process will document these efforts and evaluate other appropriate options to adjust the Land Development Code to discourage and/or obtain more preferable design for new uses of this type.

Comments/questions on a post office for the area:

- **The outlets on Collier would be the perfect place for a post office and a draw store...it would increase other businesses and help the area.**
- **I continue to be concerned about the lack of a United States Post Office in our area. Family pharmacy has a corner set up inside for this service. Can we look to develop postal service center in our area?**
- **Thank you for addressing the post office question. I am originally from Stony Brook NY. The original Stony Brook village surrounded the post office. Formed a village green surrounding it. Feels like home. We also need the service in the area! I travel to Marco Island. South Naples would be great!**

Collier County has limited authority over the placement of post offices, given that these are part of the federal government's jurisdiction as part of the United State Postal Service.

Questions/comments on specific anticipated developments:

- **We heard Home Goods, Burlington, and Planet Fitness are going in Freedom Square...when is this happening?**
- **When will Publix be going up on 41 east of Collier next to Fiddlers Creek?**

The County is not involved with leasing agreements and opening timeframes of storefronts, so related information is unknown. The Publix store at Fiddler's Creek is now under construction.

Transportation

Comments/questions on the US 41 overpass:

- **There is a tremendous amount of development east of Collier Blvd on 41 so a fly over would be helpful for transportation.**
- **What is the plan for the fly over at 41 and Collier Blvd?**

This project falls primarily under the jurisdiction of the Collier Metropolitan Planning Organization (MPO), a regional transportation planning organization. The US 41/Collier Boulevard overpass is shown as a need in the MPO's 2040 Long Range Transportation Plan (LRTP) but was not included in the Cost Feasible Plan (this latter plan indicates those projects with programmed funding). The MPO is currently updating the LRTP and extending the horizon year to 2045, so the plan regarding this project may change.

What are the plans for Davis Boulevard and Collier Boulevard?

While these roadways are under the jurisdiction of the Florida Department of Transportation (FDOT), the East Naples Community Development Plan will account for programmed improvements and coordinate with FDOT as needed on proposed local transportation options as part of the planning process.

Based on FDOT's Work Program for 2021-2025, Collier Boulevard south of US 41 approximately between Manatee and Tower Roads is undergoing lane addition/pavement rehabilitation. Collier Boulevard north of the East Naples Community Development Plan Study Area between Golden Gate Canal to Green Boulevard has activities programmed related to widening/resurfacing of existing lanes in 2024.

Improvement activities along Davis Boulevard between US 41 Radio Road were programmed in the 2015-2020 Work Program, and included activities related to widening/resurfacing of existing lanes, adding lanes, landscaping, signs/markings, lighting, and resurfacing, depending on the section. Some of these activities are noted as ongoing as of 2020.

Comments/questions on the FDOT north/south toll road:

- **Is there any update on the proposed FDOT toll road from Polk County south to Collier? Will that impact the design for East Naples?**
- **As the planning for East Naples continues, it is important to consider changes that are occurring outside of the proposed planning area and the impact those changes may have on our community. One such change, could be the FDOT North-South Connector Toll Road. If this roadway does in fact terminate in or near to East Naples, it will change the amount of traffic, commercial businesses possibilities and demographics of the community. I am not suggesting this is a positive or a negative just that items of this nature should be part of any long-range plan for our community.**

Nearly \$750 million was included in the State's budget to study and design the three M-CORES toll road projects including the Southwest-Central Florida Connector (previously referred to as the Heartland Parkway). The alignment for the corridor has not been determined at this point (another task force meeting is scheduled for 7/23). It is unlikely, however, that the corridor will extend south of I-75. We will monitor the M-CORES study and report details relevant to the ENCDP. For more information, visit: <https://floridamcores.com/>.

When will the widening of US 41 be finished?

The expansion of US 41 between Greenway Road and 6 L Farm Road from 2 to 4 lanes is identified in the 2040 LRTP Cost Feasible Plan for construction. However, it has not been funded in FDOT's 5-Year Work Program (which identifies the most immediate projects for implementation).

Specific bicycle and pedestrian concerns:

- **More dedicated, protected bike lanes that connect East/South Naples with Naples proper, to include pedestrian walkway(s) over US 41.**
- **The local St. Andrews road is experiencing a lot of traffic and has had issues including a pedestrian death.**

Non-motorized connections, including safety considerations, is a key theme that has emerged from prior and current outreach efforts; we will take into consideration comments on specific bike and pedestrian needs in addition to a review of existing transportation analysis and planning efforts that we will use as a basis for transportation options and recommendations in this plan.

Who is responsible for street direction signs, such as those for Naples Reserve Boulevard off US 41? It's very hard to see the entrance to Reflection Lakes and Naples Reserve from US 41.

The developer or community association is responsible for entrance signs; and, the County Transportation Dept. approves and installs all wayfinding and street signage on public roadways.

Other Public Facilities

With regards to residential expansion, what provisions have been made for an expansion on the school system in Manatee School district?

Based on data, analysis, and public input the goals of the East Naples Community Development Plan focus on improving options for non-residential land uses. As far as capacity for Manatee Elementary, current enrollment is 593 students; permanent capacity for this school as of 2018 is 706 seats, according to the Collier County School District, indicating that the current capacity can accommodate current enrollment.

Has a study of stormwater management systems along the US 41 corridor been done to determine expansion of canal capacity supporting the commercial development which is being considered?

County staff will coordinate with the FDOT to address stormwater needs/improvements for the area.

I hope that infrastructure needs for roads, stormwater management, parks, and schools, among other things, are thoroughly evaluated before deciding whether we need more restaurants and shopping centers in East Naples.

The Community Development Plan process will document existing and planned public facilities and services to support development and/or redevelopment in the area; more detailed impacts to public services and infrastructure are also analyzed as part of the development review process for new developments.

Participation

Can the August meeting also be a webinar, which will help summer travelers participate?

We plan to have a virtual component to our next meeting and related outreach/engagement efforts given the number of seasonal residents and social distancing considerations related to the coronavirus based on guidance from the Center for Disease Control.

Is there a committee one could be part of?

Based on recommendations in the ENCDP, various opportunities to participate in committees will be available to interested stakeholders/residents.

Do online participants need to do anything special to be added to the distribution list for updates? Did registering online automatically add us to that list?

Those who registered for the workshop virtually will be contacted to join the project email list; attendees can sign up for the list at any time on the project website (<http://colliercountyfl.gov/EastNaplesCDP>).

Will we receive the PowerPoint?

A recording of the webinar and a copy of the PowerPoint will be made available on the project website. We will send an email to the project email list once those materials are posted, and you can join the

email list via the project website (<http://colliercountyfl.gov/EastNaplesCDP>).

What if a lot more or different survey responses are received after the June 9th date when the preliminary survey results were analyzed for this workshop?

The project team will add any additional survey responses received between June 9th and July 9th to the overall survey summary, document findings, and note any changes to the preliminary findings in the subsequent public outreach and engagement efforts.

Other Topics

Do we have any projects on rain barrels?

The Stormwater and Pollution Control Sections have information on rain barrel programs and projects.

Are there any other plans to install art in the area? Love the new statue erected for Donna.

Aesthetics and design were key themes that emerged from the preliminary survey results. Comments such as this one on art can be considered as part of future branding discussions for the area. The Community Redevelopment Area just west of the East Naples Study Area is also developing a Public Art Plan, which can be viewed here: <https://bayshorecra.com/projects/public-arts-master-plan/>.