

**Justification of the Proposed
Amendment Based Upon Sound
Planning Principles
Exhibit G**

School Facilities – Comprehensive Plan Map Amendment

G - Justification of Proposed Amendment Based Upon Sound Planning Principles

The School District of Lee County is the public school provider for Lee County. Public schools are critical infrastructure, affecting not only the welfare of children and families, but also the economic stability of the communities they serve. Coordination of school locations and facilities between the School District and the Village is essential to sound land use planning for positive social and economic outcomes.

As required by Florida Statutes, District staff engaged with Village of Estero administration on these efforts. Florida Statutes regarding Community Planning and Educational Facilities (F.S. Chapter 163 and F.S. Chapter 1013) require school districts to collaborate with local municipal governments to ensure that schools meet local planning requirements, standards, and objectives.

The needs for new school facilities in Estero is based in sound planning practice of data collection, analysis, evaluation of alternatives, coordination and vetting to arrive at a conclusion. The School District staff determines need based on a thorough evaluation of: 1) current and future capacity demands, 2) available space for capacity expansion, and 3) the involvement of the Village of Estero in the early planning for this project. See the attached School District Memorandum dated May 26, 2020 for data and analysis supporting the need for the proposed schools and their siting.

The Congress for New Urbanism establishes the principle that:

Concentrations of civic, institutional, and commercial activity should be embedded in neighborhoods and districts, not isolated in remote, single-use complexes. Schools should be sized and located to enable children to walk or bicycle to them.

The location proposed for the new schools lie adjacent to civic uses of the post office, church and across Three Oaks Parkway from the South Regional Library. The addition of schools and associated facilities will contribute to the concentration of civic and institutional uses in an area of the Village where residents are also concentrated. Connections for walking and bicycling between nearby neighborhoods and the school site will be finalized during the site design and development permitting phases.

The proposed Future Land Use Map amendment to accommodate the proposed schools within the Public Facilities Future Land Use designation is based in sound planning principles through the exercise of sound planning practices, coordination with the local jurisdiction, and adherence to the new urbanism principle of locating schools where convenient for access by children and among other civic and institutional uses.



LEE COUNTY SCHOOL DISTRICT FACILITIES

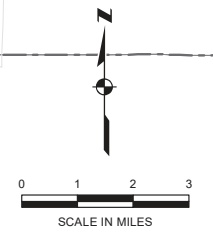
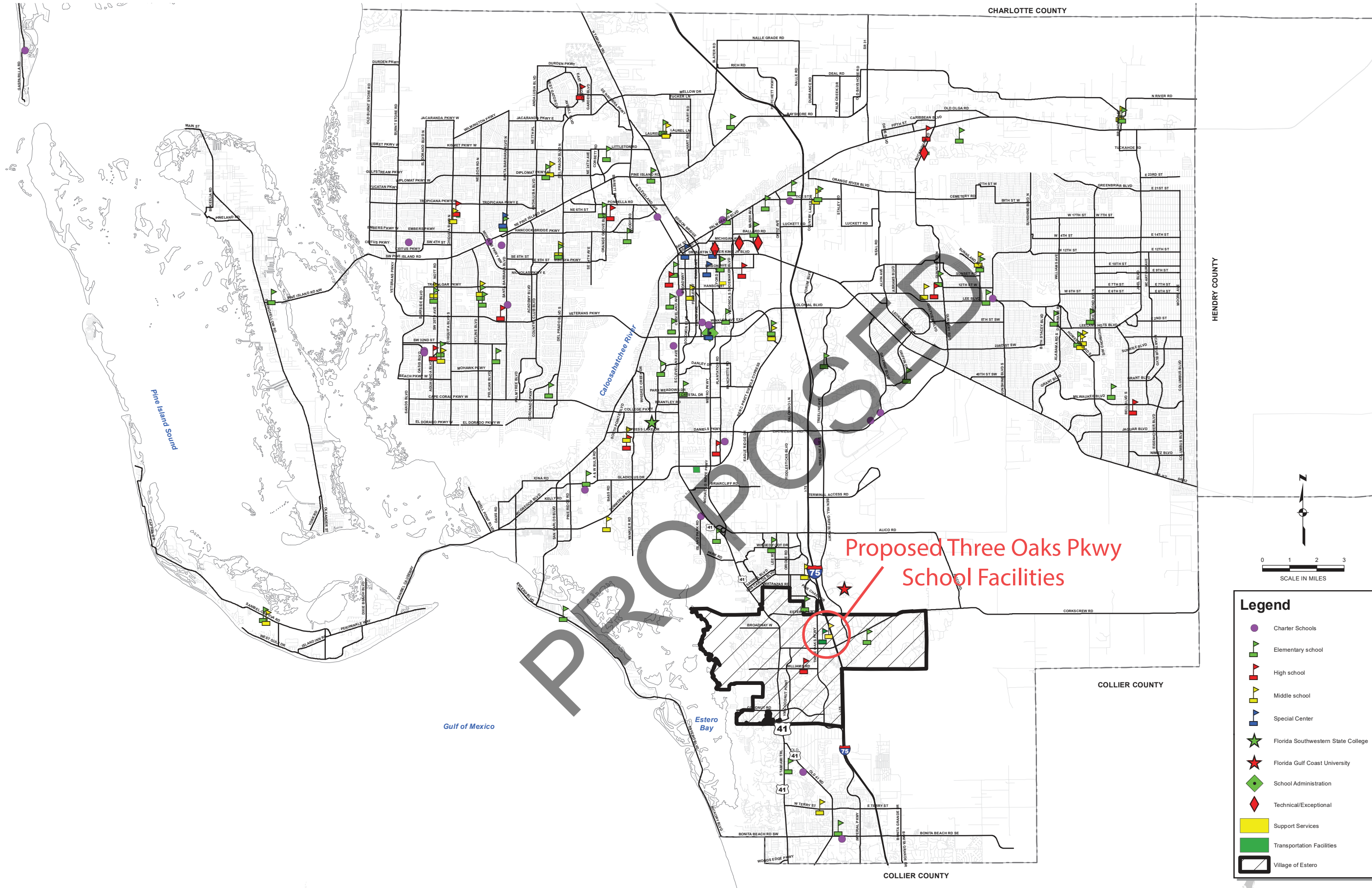
DATE
 NOVEMBER 2017

PROJECT
 20160267-000

FILE NO.

SCALE
 AS SHOWN

MAP
 PSF-1



Legend

- Charter Schools
- ▲ Elementary school
- High school
- ▭ Middle school
- ▼ Special Center
- ★ Florida Southwestern State College
- ★ Florida Gulf Coast University
- ◆ School Administration
- ◆ Technical/Exceptional
- ▭ Support Services
- ▭ Transportation Facilities
- Village of Estero

REVISIONS

NOTES

1. The information shown is per Map 23 of the Lee Plan dated August 2017, adopted per Lee County Ordinance No. 17-19 (CPA2017-00003).
2. The Village of Estero boundary is from Lee County government dated October 1, 2015.





THE SCHOOL DISTRICT OF LEE COUNTY

Memorandum

To: Dr. Gregory Adkins, Superintendent
Dr. Kenneth Savage, Chief Operating Officer

Through: Kathie Ebaugh, AICP, Executive Director
Dominic Gemelli, Planning Director

From: Cindy Leal Brizuela, Senior Planner
Courtney Gordon, GIS Planner

RE: Estero Elementary and Middle School Development

Date: May 26, 2020

INTRODUCTION

Recognizing the need to provide additional capacity to meet the growing student population in Lee County School District's (District) south 2 subzone (S2), the District's FY20 Capital Budget provided for the construction of elementary and middle schools to be located within the Village of Estero (Village). Over the course of the last year, School District of Lee County Staff (District staff) used these funds to begin the construction of these schools by 1) hiring an architect, construction manager, and building official; 2) drafting design alternatives; and 3) obtaining the necessary planning entitlements and environmental permits.

As required by Florida Statutes, District staff engaged with Village of Estero Staff (Village staff) on these efforts. Florida Statutes regarding Community Planning and Educational Facilities (F.S. 163 and F.S. 1013) require school districts to collaborate with local municipal governments to ensure that schools meet local planning requirements, standards, and objectives. As a result of working with Village staff in the design and planning for the construction of the elementary and middle schools, it has become clear to District staff that the Village has significant concerns about the project as currently proposed at the Block Lane property. Consequently, this has restrained the District's ability to obtain the required planning and development approvals from the Village.

This memorandum seeks to resolve our current situation through the following: 1) clarify the background considerations related to this issue; and 2) identify options to move forward. Through the assessment of the issues and options, District staff seeks to receive direction and support from the Lee County School Board (Board) about how to best meet the student population demands in the S2 subzone.

SECTION 1: ISSUE BACKGROUND

Before the District can determine the best option for providing the S2 subzone additional elementary and middle schools capacity to meet the student population demands, it is important to better understand the background of this issue. District staff has conducted a thorough evaluation of 1) current and future capacity demands, 2) available space for capacity expansion, and 3) the involvement of the Village of Estero in the early planning for this project. First, District staff assessed the current and future capacity demands of the S2 subzone by evaluating enrollment, determining available capacity, and identifying future growth demands. Next, District staff researched how to best increase capacity by considering the development of a District-owned property, feasibility of expanding capacity at existing schools, and opportunities to acquire and develop a different property. Finally, District staff considered the Village's role in planning and development of the proposed elementary and middle schools. By understanding how capacity demands, space availability, and Village involvement impact this issue, the District can assess options to proceed with confidence.

I. Current and Projected South Zone School Capacity

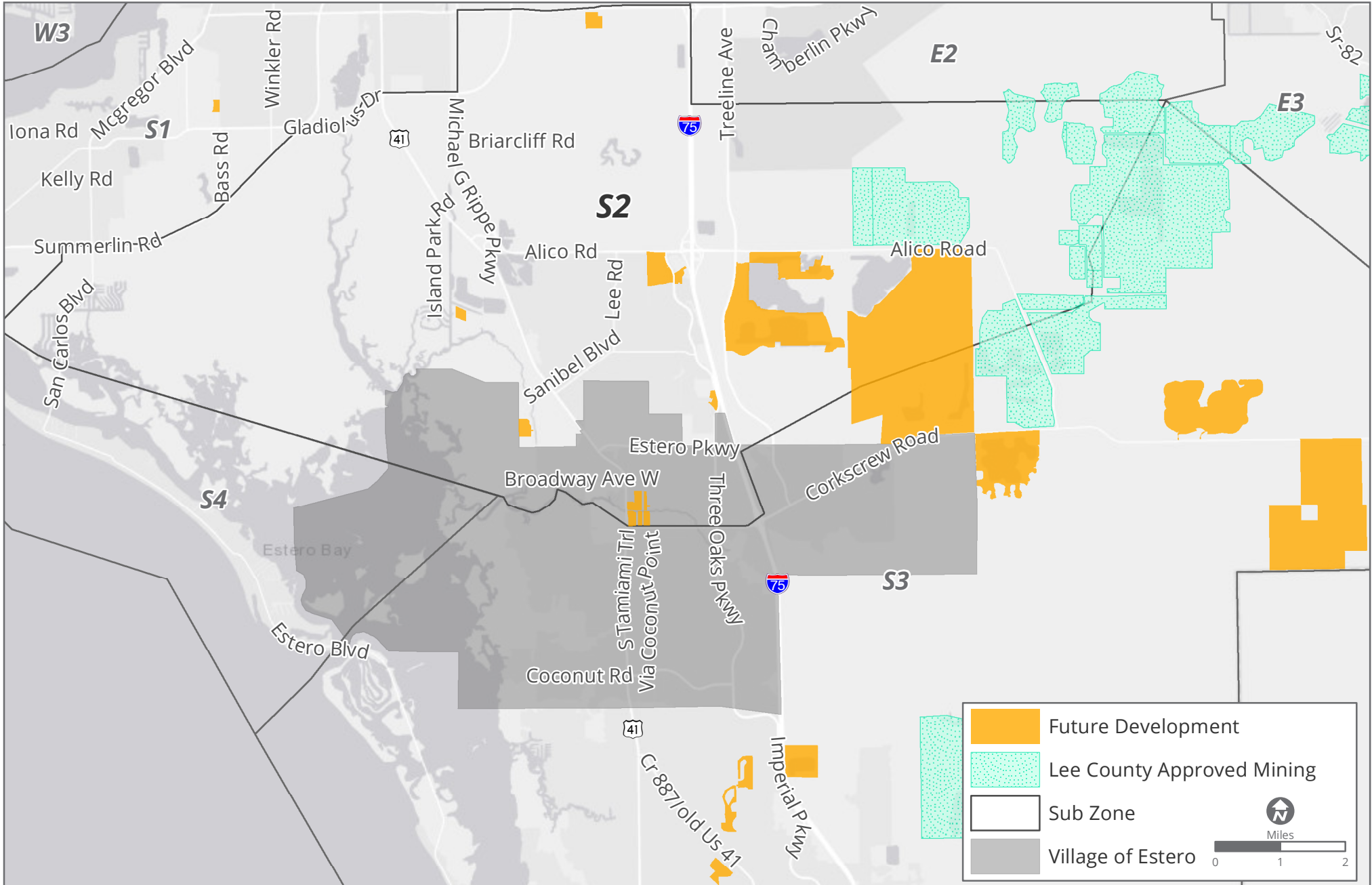
Current Enrollment Needs

S2 subzone is located within one of the most active development corridors in Lee County (Map 1.1). Spurred by communities such as Stoneybrook, Wildcat Run, The Preserve at Corkscrew, Bella Terra, Corkscrew Shores, and Grandezza, the S2 subzone has been growing steadily since the early 2000s. The result of this development growth is that elementary and middle schools in the S2 subzone are currently overcapacity—with an overall utilization rate of 107% (Map 1.2).



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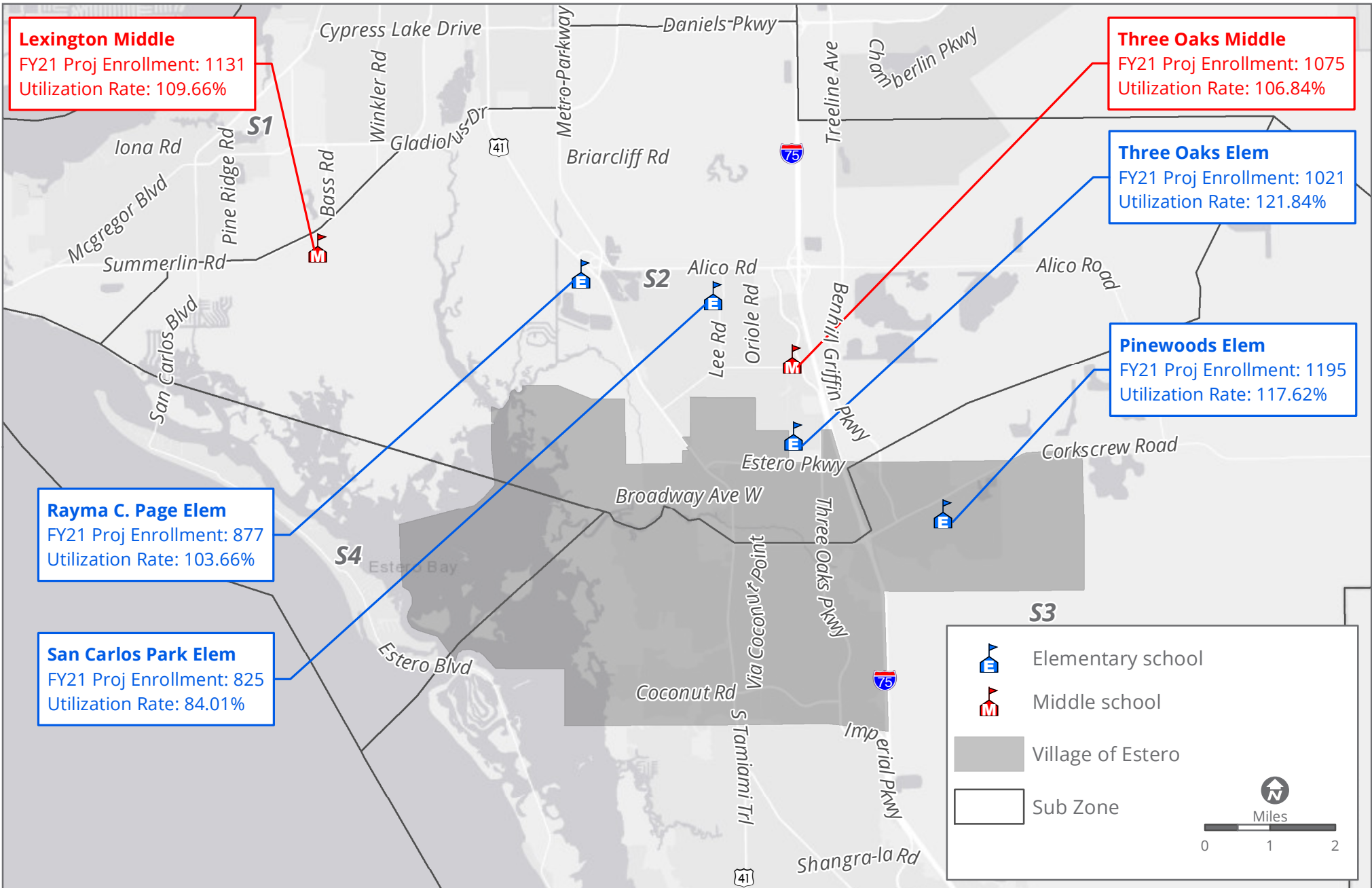
Map 1.1 Future Development





THE SCHOOL DISTRICT OF LEE COUNTY

Map 1.2 South Subzone 2: School Utilization



The District has two middle schools and four elementary schools that currently serve the South S2 subzone—Three Oaks and Lexington Middle Schools as well as Three Oaks, Pinewoods, San Carlos Park, and Rama Page Elementary Schools (Map 1.2). While Pinewoods Elementary is in the South subzone 3 (S3), it is included as part of the S2 subzone area schools because it is located on the S2/S3 line and helps serve the student population included in the S2 subzone. The projected SY20/21 utilization rate for these elementary schools is 106% and for middle schools it is 108%. In recognition of the capacity demands in the S2 subzone, the Florida Department of Education approved the construction of additional elementary and middle school capacity in 2018.

Projected Capacity Demands

The growth of the Estero area is expected to continue as nearly 5,000 residential units are currently in the development process in this area (Table 2). In the next decade, the steady growth of this area is expected to generate over 1,000 additional elementary and middle school students—as well as over 300 additional high school students (Tables 1 and 2).

Table 1: Units Permitted by Estero Area Communities

| Estero Area Communities | Units |
|--------------------------------|--------------|
| Wild Blue | 1,096 |
| The Place | 1,325 |
| Verdana Village | 2,400 |
| <i>Total</i> | <i>4,821</i> |

Table 2: Students Generated by Estero Area Communities by School Level

| Level | Students Generated by Estero Area Communities |
|--------------|--|
| Elementary | 718 |
| Middle | 342 |
| High | 371 |
| <i>Total</i> | <i>1,431</i> |

The continued development of the Estero area demonstrates the need for additional elementary and middle school capacity in the near future.

II. Potential Locations to Address Capacity

There are several potential opportunities the District has available in order to expand capacity including 1) the development of one of two District owned properties, 2) assessing the feasibility of expanding capacity at existing schools, and 3) exploring opportunities to acquire and develop a different property not currently owned by the District. While specific strengths and challenges of each of these opportunities will be explained in the Option Section, the following discussion highlights the key components.

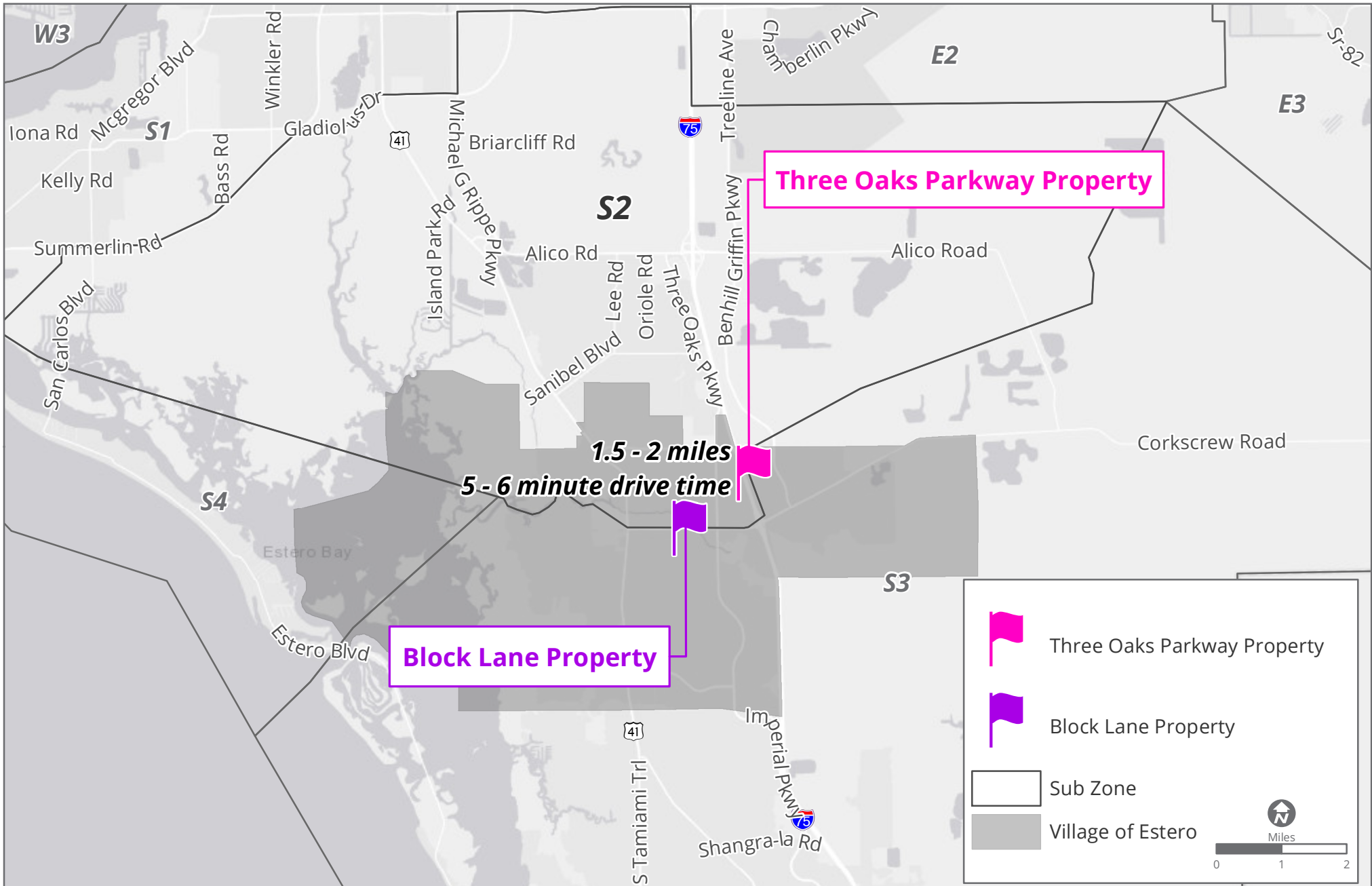
South Zone District Owned Property

The District owns two properties in the S2 subzone: a 70-acre property located on Three Oaks Parkway and a 15-acre property located on Block Lane adjacent to Estero High School athletic fields (Map 1.3). Both properties have been approved via the Site Selection Committee as described in Board Policy 9.01.



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Map 1.3 Distance Between Three Oaks Parkway Property and Block Lane Property



Three Oaks Parkway Property: The Three Oaks Parkway property was purchased in 2003 for \$5.8 million in order to construct a dual school site. The future land use (FLU) designations on this property are Village Neighborhood-2 and Wetlands; the zoning classification is Agriculture (AG-2). The property has several wetlands but has current environmental permits from the Southwest Florida Water Management District (SWFWMD) and Army Corps of Engineers (ACOE). Property access is provided via Three Oaks Parkway. The current contracts with the architect and construction manager would need to be revised to allow for the development of this property. Based on the needed planning and site development changes, schools on this property would have a target open date in August 2023.

If the District selected this property to construct the elementary and middle school facilities the District must 1) continue working to renew existing SWFWMD and ACOE permits which are set to expire November 13, 2020 and September 11, 2020, respectively; 2) request the Village approve an amendment of the future land use designations to Public Facilities through a public hearing process; 3) evaluate wetland preservation; 4) receive development order approvals from the Village; and 4) assess how to address contract changes.

Block Lane Property: The Block Lane Property was purchased in 2019 for \$4.0 million in order to support Village goals to 1) utilize the Three Oaks Property as a tax generator and 2) develop an "Academic Village" which would integrate Village area schools, parks, and recreation resources in a single shared campus. The future land use (FLU) designations on this property are Village Neighborhood-2 and Wetlands; the zoning classifications are Agricultural (AG-2) and Residential Planned Development (RPD). In order to provide for sufficient space for the elementary and middle schools space, lands currently used for athletic fields at Estero High School would be constructed upon. Depending upon site design, access is available off Williams Road or River Ranch Road. The existing contracts with the architect, construction management, and building officials allow for the development of this property.

If the District selected this property to construct the elementary and middle school facilities the District must 1) receive wetland permits from SWFWMD and ACOE; 2) amend its future land use designations to Public Facilities; 3) rezone the property to Community Facility Planned Development; and 4) evaluate how to provide adequate athletic facilities at Estero High School. Based on the needed planning and site development changes, schools on this property would open in August 2023.

Acquire A New Site

There is limited land available for development or redevelopment along Corkscrew Road to the east of I-75. All of these properties have challenges including size, location, and planning and environmental requirements. First, most of the available land is not large enough to construct elementary and middle school space. Next, those properties that are large enough to construct these facilities are located either far east of the residential developments, near active mines, or too far north in the Estero area. Additionally, a few of the undeveloped parcels have been identified as nominees in the County's Conservation 20/20 program. Finally, Southeast Lee County development areas are dominated by the Density Reduction/Groundwater Resource (DR/GR) and the Wetlands designations—which have stringent planning and environmental requirements and permit standards. In order to address the size, location, and planning and environmental challenges, the District would have to work with other government entities that have the authority to designate land entitlements and permit environmental conditions. Additionally, any future land acquisition by the District would require the property to undergo the District's site selection process which would further impact the development timeline. Given the planning, site development, and approval processes involved with identifying and acquiring a new property, it is unknown when schools could open if the District chose to build on a property not currently owned by the District.

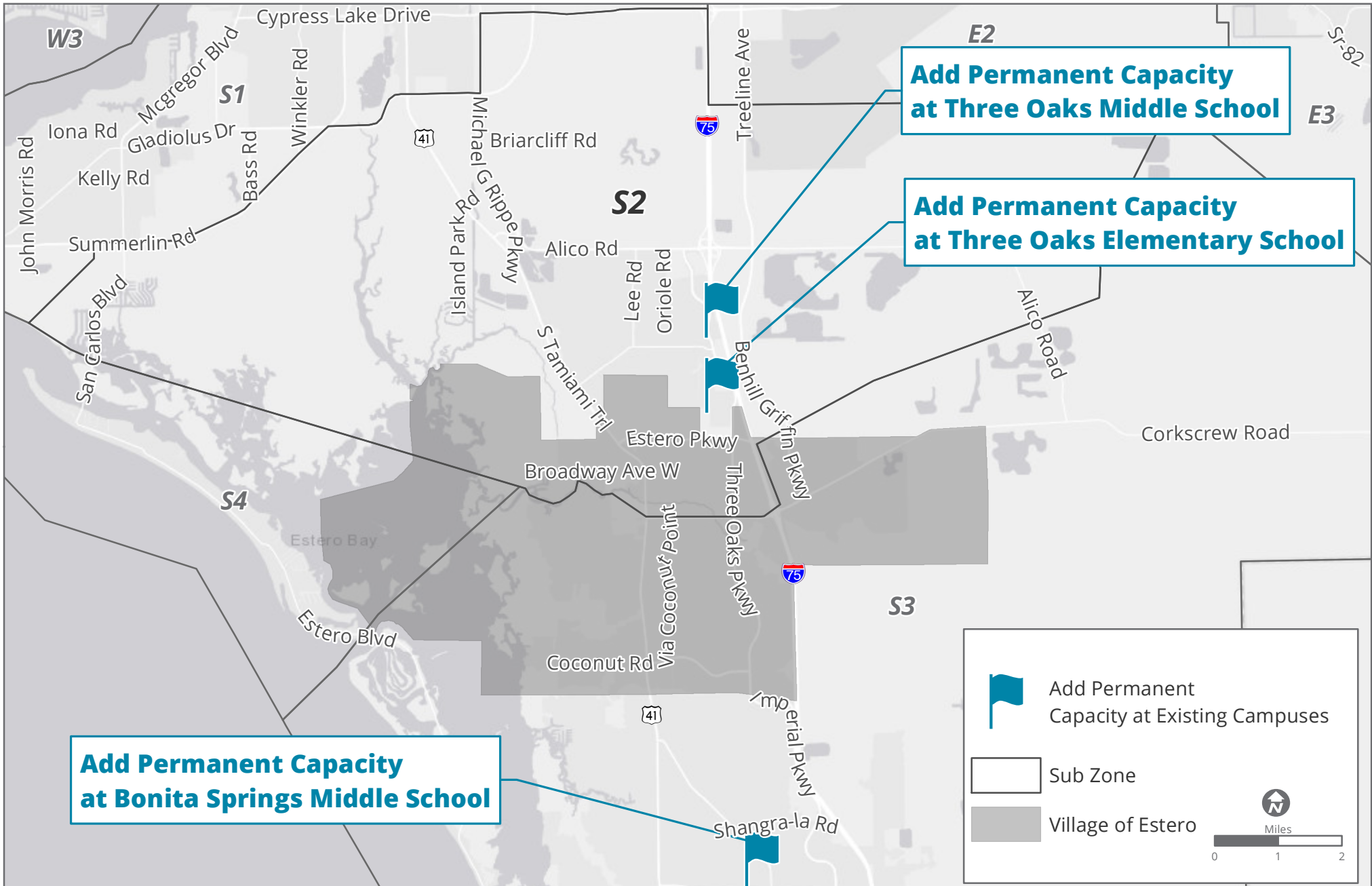
Expand Capacity on Existing Schools


As discussed previously, there are six elementary and middle schools servicing the S2 subzone—two middle schools and four elementary schools (Map 1.4). There is a possibility that the District could permanently add to the capacity of these schools either by constructing new classroom buildings or placing District-owned portables on the campuses. Permanent expansion of an existing campus would require the schools to possibly increase some or all of the core facilities and systems—cafeterias, administrative space, media center, athletic or outdoor space, HVAC systems, and internal transportation network—to meet the demands of the additional capacity. Additionally, it would require an evaluation of property conditions—land space, environmental needs, stormwater capacity, and access. Next, it would require the District to work with other government entities regarding permanent capacity to receive the required planning and environmental approvals as well as address off-site adjacent transportation improvements. Finally, given the planning, site development, and approval processes involved to identify and expand capacity, it is unknown when schools could open additional permanent capacity on an existing school campus.





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Map 1.4 Add Permanent Capacity at Existing Campuses



 Add Permanent Capacity at Existing Campuses

 Sub Zone

 Village of Estero

 Miles
0 1 2

III. Village of Estero Involvement

Construction of new school facilities is a coordinated effort through which the District collaborates with local municipal governments, regional environmental agencies, and other organizations to plan and develop public educational facilities. F.S. 1013 and F.S. 163 establishes the foundation through which school districts and local municipal jurisdictions are required to work together. Specifically, F.S. 1013 (3) requires that school districts adhere to the local land use designations established through municipal FLU and zoning regulations.

Recognizing the role local governments play in the development of school facilities, the District started working with the Village on the construction of planned school facilities a few years ago. At the time, the District was prepared to build a co-located elementary and middle school facility on the Three Oaks Parkway property. However, the Village preferred the construction of an "Academic Village" which unified academic, park, and recreational facilities together in one central location in the area of Estero Community Center and Estero High School. Additionally, the Village indicated a desire to have the Three Oaks Parkway property sold for development in order to contribute to their tax base. As such, the District agreed to move the schools near the high school. In doing so, the District 1) sought and purchased the Block Lane property; 2) placed the Three Oaks Parkway property for sale; and 3) started planning and designing an elementary and middle school site at the Block Lane property. The Village was kept apprised of and invited to participate in the District's school planning effort. While this effort seemed to be moving ahead, the Village was unable to secure the additional land necessary in order to realize the vision of the "Academic Village." Furthermore, without that additional land, the Village felt the consequent site design appeared too compressed and far from the expansive design concept that originated this effort. The Village expressed additional concerns that the middle and elementary school campus would use too much of the high school's athletic fields. All the while, the Three Oaks Parkway property remained available. Without a clear design path forward that would satisfy the Village concerns and recognizing the Village has the authority to approve the amendments of the future land use and zoning maps, the Village suggested that the District reconsider the use of the Three Oaks Parkway property. The Village then went a step further and brought the issue up for consideration at a public workshop of the Village Council held on April 22, 2020.

As a result of that workshop, the Village gave public notification to the District that they would formally support the construction of a co-located elementary and middle school site on the Three Oaks Parkway property and would not prefer the Block Lane property. While the Village's public act of support is non-binding, the public action can only be viewed as a vote of confidence that the District can proceed with the necessary future land use amendments and land development approvals with the support and backing of the Village.

SECTION 2: DEVELOPMENT OPTIONS

The growth of the Estero/Corkscrew Road area has spurred the growth of the student population in the Estero area and caused this area to be over-capacity. The growth of this area is expected to continue into the future, which continues to increase the need for additional school capacity. In order to provide for the educational needs of this area, District staff has reviewed the following four options:

- 1) Construct on the Three Oaks Parkway property;
- 2) Construct on the Block Lane property;
- 3) Expand capacity at existing facilities; and
- 4) Acquire and construct a new property outside the Village of Estero.

The following section outlines each of these options.

Option 1: Construct on Three Oaks Parkway Property

Proposal

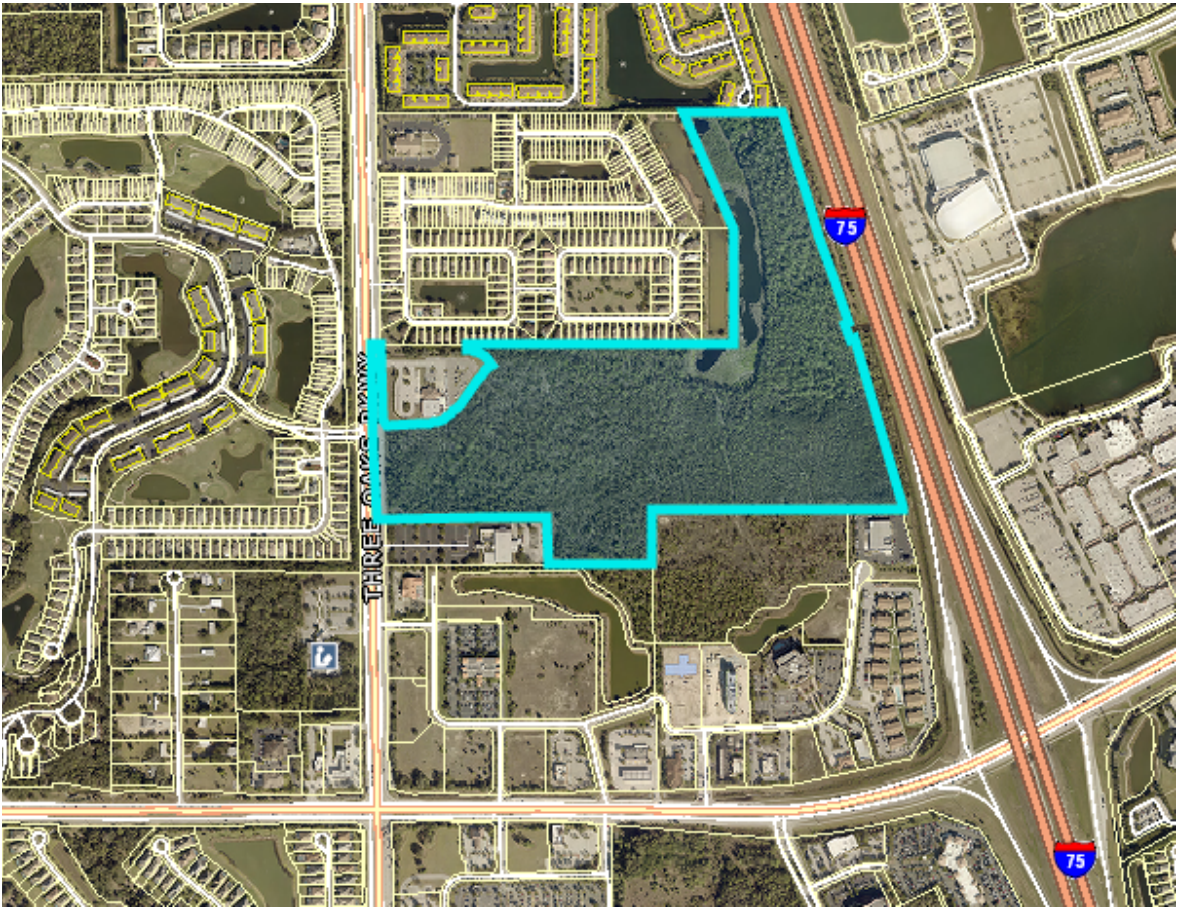
The Three Oaks Parkway Property is located north of Corkscrew Road, east of Three Oaks Parkway (where the primary access is proposed), and west of I-75. It is located within the Village of Estero where the Council and Village Staff support the proposal to construct elementary and middle schools at this location.

Timeline*

- Comprehensive Planning Phase – Complete by March 2021, With Village Approval
- Land Development Planning Phase – Complete by September 2021, With Village Approval
- Construction – Complete by June 2023
- Open – August 2023

**Each component of timeline is contingent on Village approval*

Figure 1: Aerial of Three Oaks Parkway Property

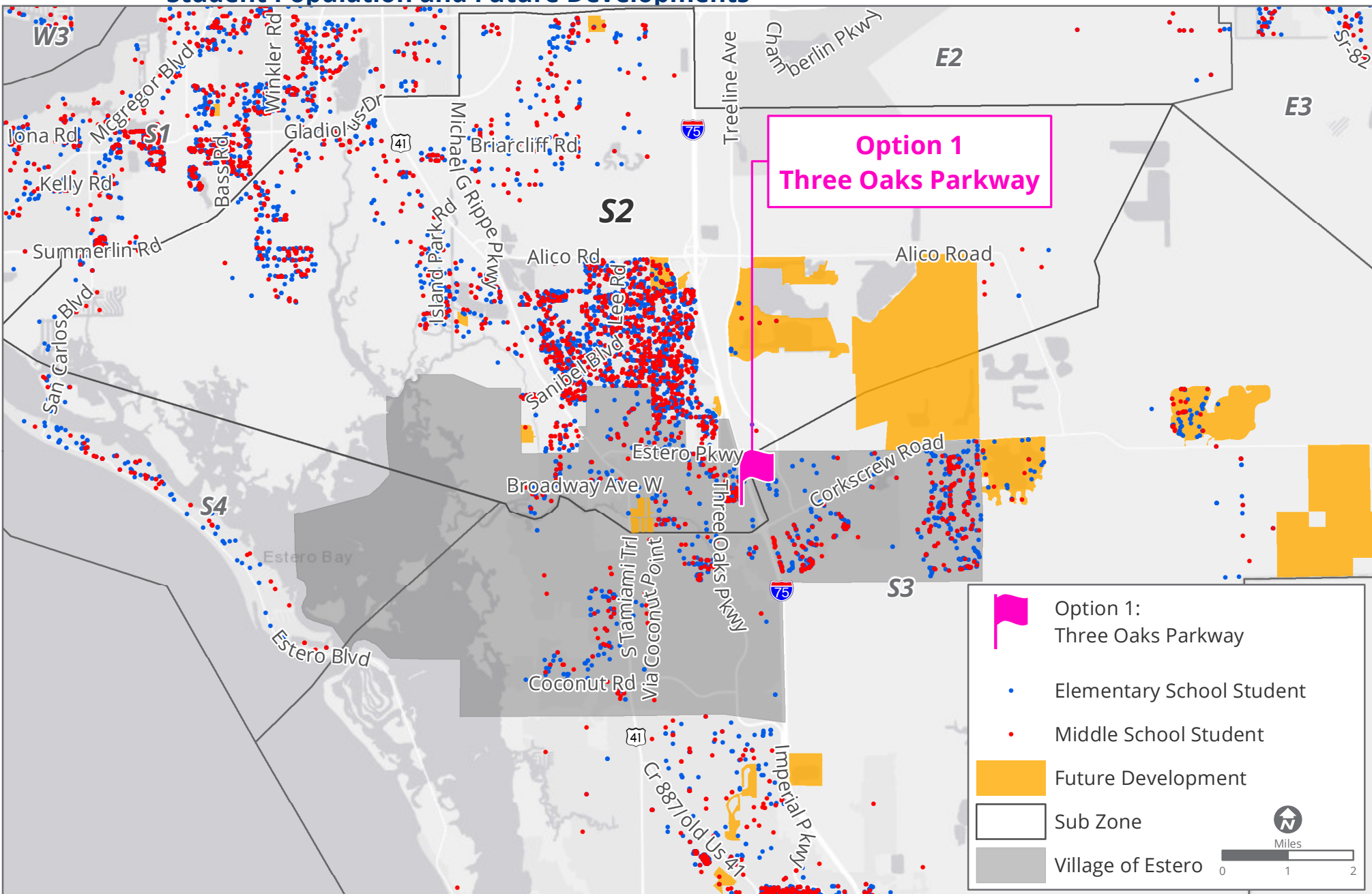




THE SCHOOL DISTRICT OF LEE COUNTY

Option 1: Three Oaks Parkway

Student Population and Future Developments



| STRENGTHS | DEVELOPMENT CONSIDERATIONS |
|--|----------------------------|
| Village Council publicly supports property location/timeline | Wetland preservation |
| Village Staff supports property location/timeline | FLU amendment |
| Proper zoning classification | Site access |
| SWFWMD/ACOE Permit - Renewals underway | Vehicle Stacking on-site |
| Land flexibility/ample acreage | |
| Land purchased in 2003 for dual school site | |

Option 2: Construct on Block Lane Property

Proposal

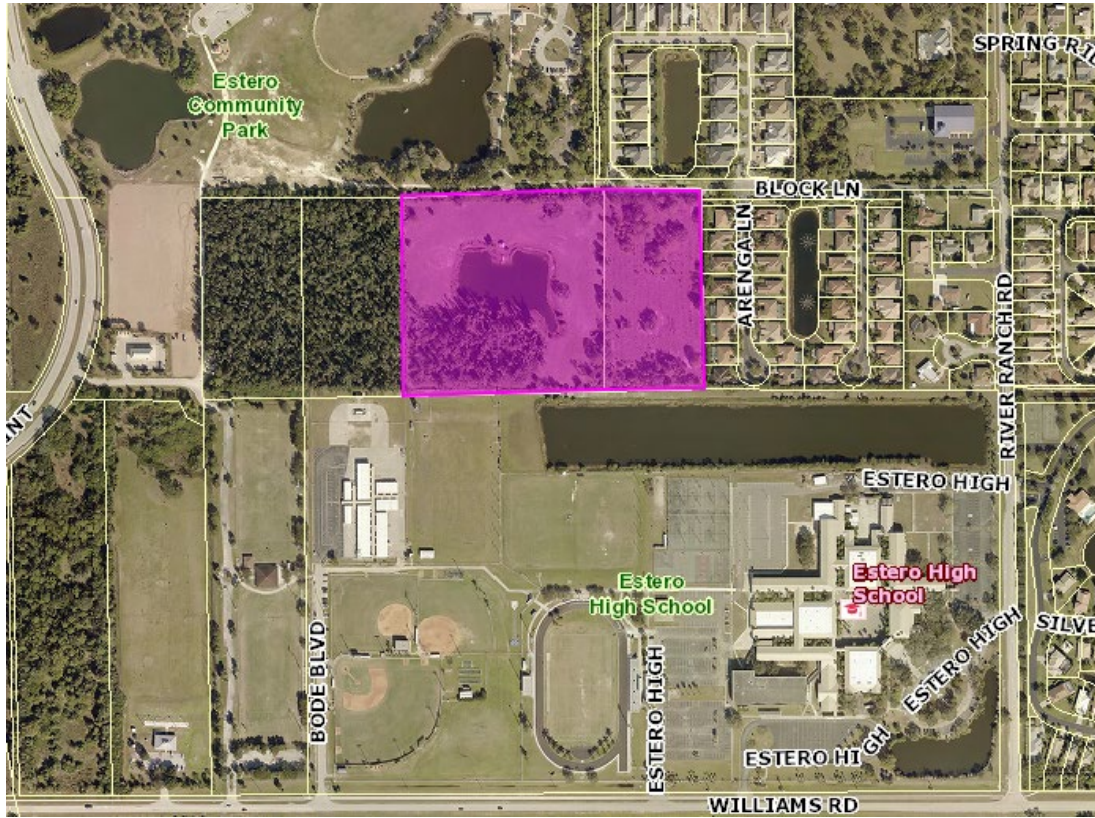
The Block Lane property is located immediately north of Estero High School and south of Estero Community Park. An elementary and middle schools are proposed at this location which would have some impact on the existing recreational facilities.

Timeline*

- Comprehensive Planning Phase – Complete by March 2021, If Approved
- Land Development Planning Phase – Complete by September 2021, If Approved
- Construction – Complete by June 2023
- Open – August 2023

**Each component of timeline is contingent on Village approval*

Figure 2: Aerial of Block Lane Property

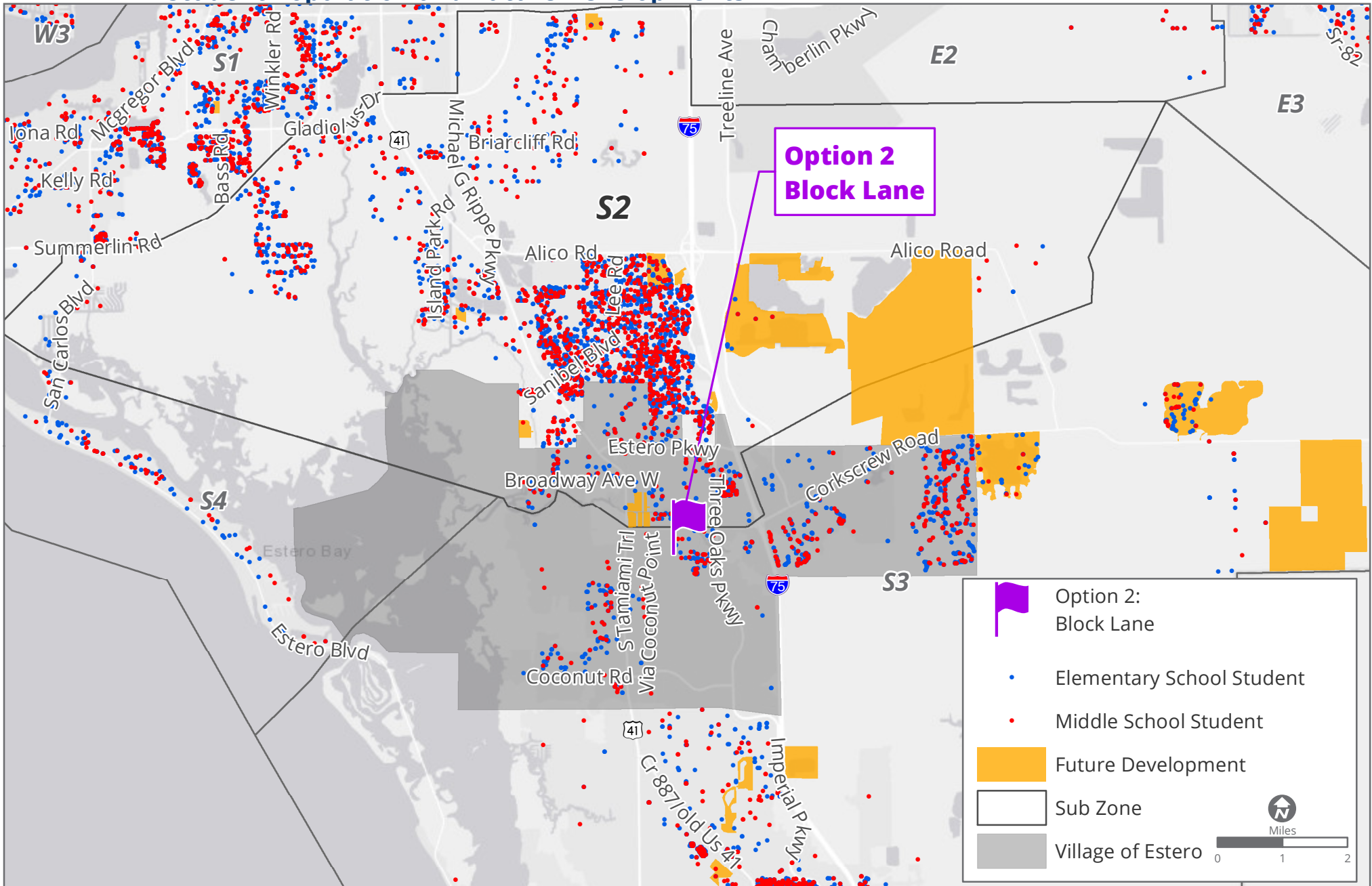




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Option 2: Block Lane

Student Population and Future Developments



| STRENGTHS | DEVELOPMENT CONSIDERATIONS |
|---|---|
| Proximity to high school and community park/recreation facilities | Village Council has publicly supported the Three Oaks Parkway property over this property |
| Separate access roads for busses and vehicles | Rezoning and FLU amendment required |
| | Reduction of athletic space in order to accommodate construction |
| | Compressed Site Plan due to Village of Estero's inability to acquire planned land |

Option 3: Additional Permanent Capacity at Existing Campuses

Proposal

An alternative to the construction of new core facilities is the installation of portables at existing school sites in the S2 subzone to relieve some of the capacity demand. Portables at Three Oaks Middle and Bonita Springs Middle would need to take into consideration supporting infrastructure such as electrical, IT, and plumbing given the possibility of a restroom. Each school could potentially accommodate four-six (4-6) portables each. There is one (1) existing portable at Three Oaks Middle.

Bonita Springs Middle can be considered as a site for expansion, however, it is significantly distant from existing student populations and is a land lease of the District.

Lexington Middle School has no space for portables or other permanent space.

Up to six (6) portables may fit at Three Oaks Elementary with improvements made to cafeteria per dining capacity as well as transportation improvements.

Timeline

- Site Planning Phase – Complete by April 2021
- Land Development Planning Phase – Complete by October 2021, If Approved
- Construction – Complete by October 2022
- Open – January 2023

Figure 3: Aerial of Three Oaks Middle School



Figure 4: Aerial of Bonita Springs Middle School

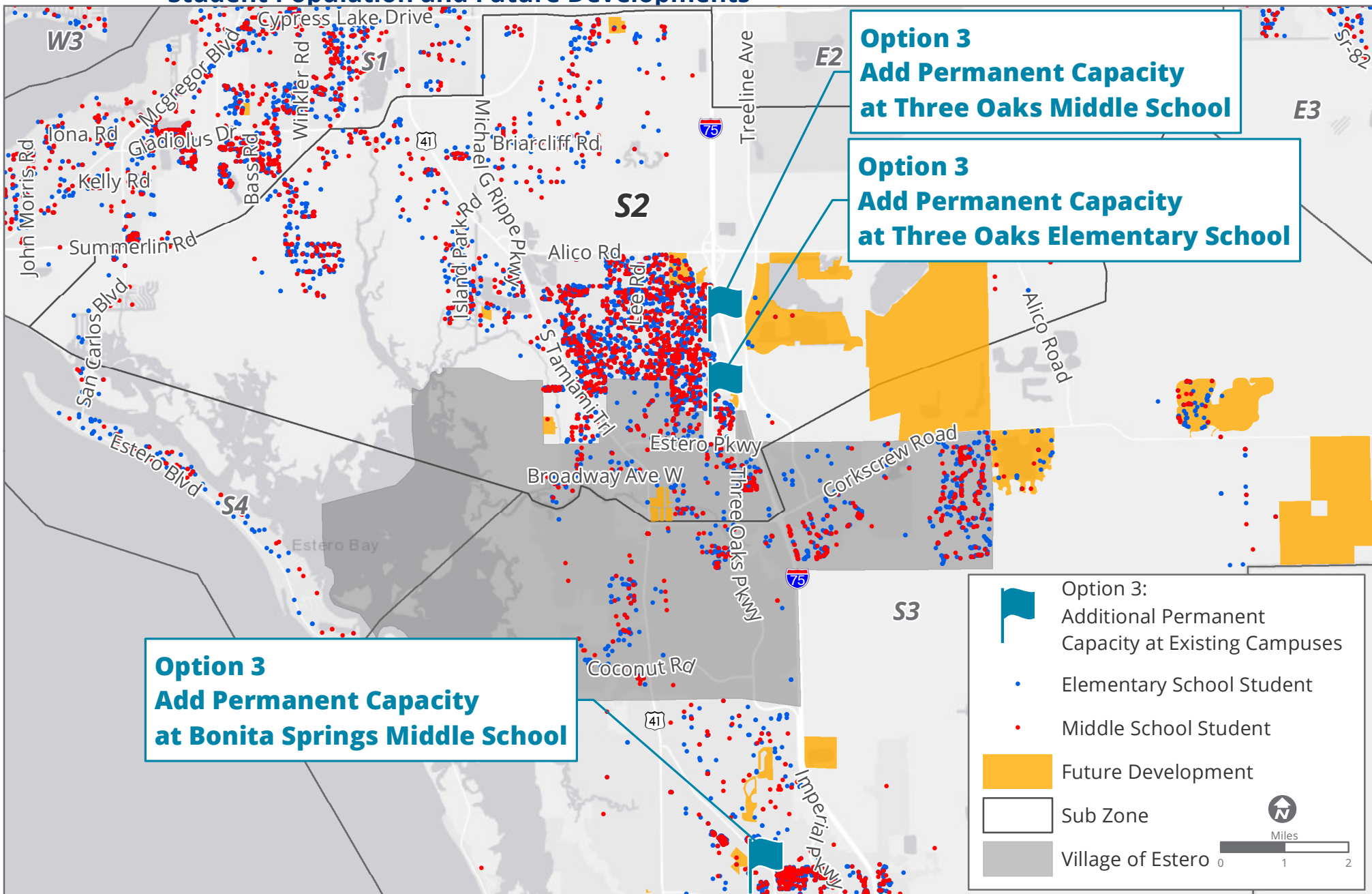




THE SCHOOL DISTRICT OF LEE COUNTY

Option 3: Additional Permanent Capacity at Existing Campuses

Student Population and Future Developments



| STRENGTHS | DEVELOPMENT CONSIDERATIONS |
|--------------------------------|--|
| Use of district-owned property | Portable/new addition placement on leased land (Bonita Springs Middle School) |
| Short-term cost efficiency | Local jurisdiction would need to approve building expansion and needed entitlements |
| | Increased demands on core facilities—cafeteria, administrative space, clinic, and media center |
| | Reduction of field space and athletic facilities |
| | Permanent overutilization of campus facilities |
| | Increased demands on constrained transportation infrastructure |
| | Increased demands on environmental resources and need to obtain associated permits |

Option 4: A New Site

Proposal

Future development in the South Zone will be east of Estero along Corkscrew Road. All properties in this area are considered to be in the Southeast Lee County planning community and feature a combination of Density Reduction/Groundwater Recharge (DR/GR) and Wetlands future land use designations. A future land use amendment will be required as well as a development order. The future land use amendment will require a minimum of three public hearings and would require additional time; one hearing before the Local Planning Agency (LPA), one transmittal hearing before the Board of County Commissioners (BOCC), and one adoption hearing before the BOCC.

Timeline

- Property Location/Purchase Phase – Complete by August 2021, If Approved
- Comprehensive Planning Phase – Complete by August 2022, If Approved
- Land Development Planning Phase – Complete by August 2022, If Approved
- Construction – Complete by March 2024
- Open – August 2024

Properties

As outlined below, District Staff has reviewed properties further east past Corkscrew Road and further north along Alico Road (Map 4.1).

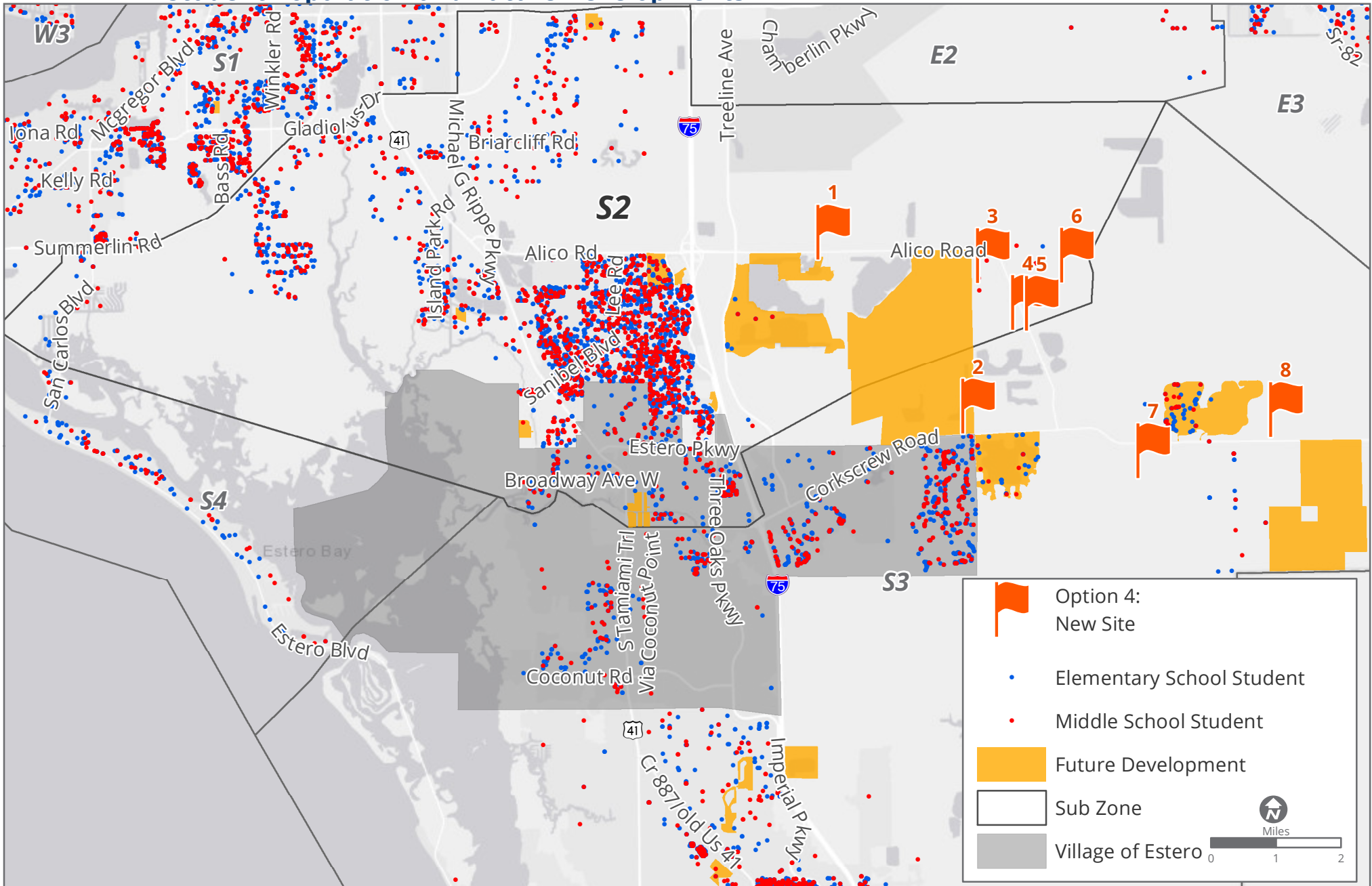
- Property 1 is located along Alico Road and allows for flexibility in site design for multiple schools due to the large acreage available at this location. While direct access to Alico Road would be beneficial, this location is adjacent to a mining operation where limerock trucking may be a concern.
- Property 2 is ideally located along Corkscrew Road adjacent to planned roadway improvements. It has some infrastructure in place but would require the same development permitting as any other site selected within Southeast Lee County except that it has been cleared and filled. There is also a possibility that this site may be pulled from the market and move forward with residential development. It should be noted that the work completed on this site has contributed to the \$10 million asking price.
- Properties 3, 4, 5, and 6 are located along a mining corridor. Sites 3, 4, and 5 are located along Alico Road but are in very close proximity to industrial operations. Site 6 is also in close proximity to an active mining operation and is located along Green Meadow Road. These four properties were eliminated from future consideration due to their proximity to the mines.
- Properties 7, 8, 9, and 10 are located to the east of the Alico Road intersection along Corkscrew Road. There are currently no plans to improve or widen this segment of Corkscrew Road. Additionally, while these properties are in proximity to new development in Southeast Lee County in S3, they are far from existing developments in the S2 subzone and were therefore eliminated from future consideration. Additionally, there are limited areas to the east of I-75 along Corkscrew Road which are identified as future service areas for both water and sewer utilities.



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Option 4: New Site

Student Population and Future Developments



Out of 10 potential properties outside of the Village of Estero, only two (2) have been considered as potential school sites for the South Zone. The permitting requirements of developing in DR/GR areas can be lengthy, any potential school site outside of the Village of Estero in this future land use designation will impact the timeline for opening core facilities. While a school site in this area is anticipated in the future, the Estero properties at Three Oaks Parkway and Block Lane are more centrally located to where current students reside than either of the locations identified in Southeast Lee County.

| STRENGTHS | DEVELOPMENT CONSIDERATIONS |
|------------------------------|---|
| Located near new development | Cost to purchase land |
| | Time to purchase land |
| | Land Use, Zoning, and Land Development Regulations---potential changes and required site improvements |
| | Wetland preservation and permitting |
| | Increased distance from students currently being serviced well beyond existing sites |

RECOMMENDATION

Proposed Action

Based on the findings shared in this memorandum, District staff recommends that the District proceed with Option 1: Construct on Three Oaks Parkway property to pursue the construction of additional elementary and middle school capacity. District staff concludes that after a thorough evaluation of all considerations presented, this option will result in the greatest long-term benefit to the District.