



**LEE COUNTY HISTORIC PRESERVATION BOARD
OLD LEE COUNTY COURTHOUSE
2120 MAIN STREET
FORT MYERS, FL 33901
EAST ROOM (2ND FLOOR)**

**WEDNESDAY, MAY 16, 2012
10:00 AM**

AGENDA

- 1. Call to Order/Review of Affidavit of Publication**
- 2. Approval of Minutes – March 21, 2012**
- 3. Review of the Historic Preservation Element of the County's Comprehensive Plan**
- 4. Items by the Public; Board Members; Staff**
- 5. Next Meeting Date: To be determined; Adjournment**

Any person appealing a decision made at this hearing must ensure a record of the proceedings is made. In accordance with the Americans with Disabilities Act, Reasonable Accommodations will be made upon request. If you are in need of a Reasonable Accommodation or would like additional information, please contact Janet Miller at (239) 533-8583.

**MEMORANDUM
FROM
THE DEPARTMENT OF COMMUNITY DEVELOPMENT
DIVISION OF PLANNING**

DATE: May 5, 2012

TO: Historic Preservation Board

FROM: Gloria M. Sajgo AICP

RE: Historic Preservation Element of the Comprehensive Plan

Attached you will find three versions of the Historic Preservation Element. Staff is requesting that you review the proposed element and vote to recommend its approval

Attached Documents:

1. ***Historic Preservation Element of the Comprehensive Plan.*** Please find attached
 - The existing element,
 - The proposed element in ~~striketrough~~ and underline format and
 - The proposed element.

As you review the proposed element you may find the following documents helpful:

- 2 ***Lee Sustainability Assessment Planning and Design Chapter with a green tab by Historic Preservation and Cultural Heritage.***

Please note that **Tessa LeSage**, who heads the **Lee County Office of Sustainability** will attend the May 16, 2012 HPB meeting to discuss the role of the Lee County Office of Sustainability.

For more information o the entire document please go to either of these two sites:

<http://www.leegov.com/gov/dept/sustainability/Assessment/Pages/description.aspx>

<http://www.leegov.com/gov/dept/sustainability/Assessment/Pages/enter.aspx>

- 3 ***The Secretary of the Interior's Standards for Rehabilitation & Illustrated Guidelines on Sustainability for Rehabilitating Historic Buildings.*** Please visit the new National Park Service website <http://www.nps.gov/history/hps/tps/>. The guidelines are available in the web site below.

<http://www.nps.gov/tps/standards/rehabilitation/sustainability-guidelines.pdf>

- 4.***Paleontological (fossil) laws: Florida and Federal***

HISTORIC PRESERVATION ELEMENT

There are 3 versions attached:

- Existing
- Proposed ~~striethrough~~ and underline
- Proposed

IX. Historic Preservation (Existing)

GOAL 141: IDENTIFICATION AND EVALUATION. To provide for the identification and evaluation of the historic resources of Lee County.

OBJECTIVE 141.1: IDENTIFICATION. Maintain existing programs to identify the historic and archaeological resources of Lee County, develop new identification programs (such as, but not limited to, a program to identify Lee County resources listed on the National Register of Historic Places), and make information available to the public and other public agencies. (Amended by Ordinance No. 94-30)

POLICY 141.1.1: Lee County will systematically maintain the Florida Site File by annual updates, corrections, and monitoring of status of listed properties. New information will be transmitted to the Florida Department of State. (Amended by Ordinance No. 94-30, 00-22)

POLICY 141.1.2: Require all applications for development review to identify the location and status of historic resources (including archaeological sites). The Lee County Historic and Architectural Survey and the Lee County Archaeological Management Plan will serve as data bases. The Historic Preservation Board will advise the Board of County Commissioners as to any action it deems appropriate or perform other duties as specified in the Historic Preservation Ordinance. (Amended by Ordinance No. 00-22)

POLICY 141.1.3: Maintain an automated system merging data regarding properties designated under Lee County Historic Preservation Ordinance into the county's parcel information system and study the feasibility of developing an automated system merging Florida Site File data into the county's parcel information system. (Amended by Ordinance No. 94-30)

POLICY 141.1.4: Lee County will continue to maintain a streamlined storage and retrieval system of the Florida Site File to allow for fast and easy access and distribution. (Amended by Ordinance No. 94-30, 00-22)

POLICY 141.1.5: Lee County will establish a scenic resource identification and evaluation program. (Amended by Ordinance No. 00-22)

OBJECTIVE 141.2: EVALUATION. Continue to evaluate the historic and archaeological resources of Lee County according to adopted criteria for significance. (Amended by Ordinance No. 94-30)

POLICY 141.2.1: Maintain adopted criteria in the Historic Preservation Ordinance for the evaluation of historic and archaeological resources that are consistent with the requirements of the Certified Local Government Program created pursuant to the National Historic Preservation Act of 1966.

POLICY 141.2.2: Evaluate the historic resources of Lee County for eligibility for nomination to the National Register of Historic Places and a local register of historic places.

GOAL 142: RECOGNITION AND REGISTRATION. To formally recognize significant historic resources and provide for their appropriate registration or local, state, or national listings.

OBJECTIVE 142.1: RECOGNITION. Lee County will continue to implement a program to formally recognize those historic and archaeological resources that are considered historically and archaeologically significant according to the Lee County Historic Preservation Ordinance. (Amended by Ordinance No. 94-30, 00-22)

POLICY 142.1.1: Lee County will maintain a local register of historic and archaeological places designated under the Historic Preservation Ordinance. (Amended by Ordinance No. 94-30, 00-22)

POLICY 142.1.2: Lee County will provide plaques and certificates for display on buildings or archaeological sites certifying their historic significance. (Amended by Ordinance No. 00-22)

POLICY 142.1.3: Lee County will establish a historic marker program with the goal of marking the locations of significant historic resources, the boundaries of historic districts, or archaeological sites. (Amended by Ordinance No. 00-22)

POLICY 142.1.4: Lee County will establish an awards program to officially recognize excellence in historic preservation activities. (Amended by Ordinance No. 00-22)

POLICY 142.1.5: Lee County will distribute certificates of historical and/or archaeological significance to owners of properties designated under the Lee County Historic Preservation Ordinance. (Amended by Ordinance No. 94-30, 00-22)

OBJECTIVE 142.2: REGISTRATION. The county will continue its program to nominate eligible structures, sites, or districts to the National Register of Historic Places. (Amended by Ordinance No. 94-30, 00-22)

POLICY 142.2.1: Lee County will initiate the nomination of eligible historic resources to the National Register of Historic Places through the Lee County Historic Preservation Board according to the Certified Local Government program. (Amended by Ordinance No. 00-22)

POLICY 142.2.2: Lee County will encourage historic property owners to nominate eligible structures, sites, or districts to the National Register of Historic Places through the provision of information and technical assistance. (Amended by Ordinance No. 00-22)

GOAL 143: LOCAL PRESERVATION TECHNIQUES. To provide for the protection, preservation, reconstruction, restoration, rehabilitation, and use of the historic resources of Lee County.

OBJECTIVE 143.1: DEVELOPMENT REGULATIONS. Lee County will continue to enact, amend, or revise, as appropriate, regulatory measures that will further historic preservation goals

and policies as stated in this element and any subsequent revisions thereof. (Amended by Ordinance No. 94-30, 00-22)

POLICY 143.1.1: Lee County will maintain in effect a Historic Preservation Ordinance in conformance with the requirements of the Certified Local Government program. (Amended by Ordinance No. 00-22)

POLICY 143.1.2: Lee County will amend the Zoning Regulations and the Development Standards Regulations, as necessary, to incorporate the findings contained within this Historic Preservation element and any subsequent revisions thereof. (Amended by Ordinance No. 94-30, 00-22)

POLICY 143.1.3: The Lee County Building Code will be amended so as to depart from the provisions of the Southern Standard Building Code and applicable fire codes, to the extent permitted by state law and proper safety practices, so as to be consistent with the Historic Preservation Ordinance and any amendment thereof. (Amended by Ordinance No. 94-30, 00-22)

POLICY 143.1.4: County development regulations will be amended in response to the recommendations contained in the Archaeological Zone Management Plan for Lee County (Piper Archaeological Research, Inc., 1987) and in any future update or revision thereof. (Amended by Ordinance No. 94-30, 00-22)

POLICY 143.1.5: Lee County will continue to study the feasibility of various incentives (such as transfer of development rights and property tax relief) as a means of accomplishing the goals and recommendations of the Historic Preservation element. (Amended by Ordinance No. 94-30, 00-22)

OBJECTIVE 143.2: INNOVATIVE TECHNIQUES. Lee County will continue to make available information, as appropriate, on a variety of legal techniques that will further historic preservation goals and aid in the implementation of the Historic Preservation Ordinance. (Amended by Ordinance No. 94-30, 00-22)

POLICY 143.2.1: Lee County will make information available generally to the public on easements, covenants, options to purchase, right of first refusal, and eminent domain, for historic preservation purposes. (Amended by Ordinance No. 00-22)

POLICY 143.2.2: The County will encourage the preservation of archeological sites and evaluate the preservation of these lands through Leasing of Development Rights (LDRs) and encourage historical tourism, sense of place, and natural areas. (Added by Ordinance No. 07-16)

OBJECTIVE 143.3: INCENTIVES. Lee County will continue to maintain a program for the provision of financial incentives for historic preservation purposes. (Amended by Ordinance No. 94-30, 00-22)

POLICY 143.3.1: Lee County will investigate the establishment of a Historic Preservation Trust Fund to be administered by the Board of County Commissioners or a non-profit organization after recommendations by the Historic Preservation Board. The Trust Fund will

consist of all monies received from federal and state sources and all monies, if any, appropriated by Lee County, and monies contributed to the fund from any other source. A framework for the administration of the fund will be established. (Amended by Ordinance No. 94-30, 00-22)

POLICY 143.3.2: Lee County will continue to seek and make applications for historic and archaeological preservation grants from private, state, and federal sources. Funds will be administered by the Historic Preservation Trust Fund, once established. (Amended by Ordinance No. 00-22)

POLICY 143.3.3: Lee County will consider implementation of the historic preservation property tax exemption program to put into effect Sections 196.1997 and 196.1998, Florida Statutes. (Amended by Ordinance No. 94-30, 98-09, 00-22)

POLICY 143.3.4: Lee County will make available Community Development Block Grant funds, when available, for historic preservation purposes. (Amended by Ordinance No. 00-22)

POLICY 143.3.5: Lee County will explore the issuance of low- interest loans for the rehabilitation of historic resources with funds from the Historic Preservation Trust Fund. (Amended by Ordinance No. 00-22)

POLICY 143.3.6: Lee County will explore ways in which the historic preservation program and the Community Redevelopment Agency can work together using tax increment financing to restore historic districts in slum or blighted areas. (Amended by Ordinance No. 94-30, 00-22)

POLICY 143.3.7: Lee County will provide information and technical support in the use of community reinvestment or rehabilitation investment tax credits. (Amended by Ordinance No. 00-22)

OBJECTIVE 143.4: PUBLICLY OWNED SITES. Lee County will continue to preserve and protect the historic and archaeological resources owned, acquired, or disposed of by Lee County by designating them under the Lee County Historic Preservation Ordinance if feasible. Lee County will continue the program to preserve and protect those historic and archaeological resources owned, acquired or disposed of by Lee County which do not qualify for designation under the Lee County Historic Preservation Ordinance. (Amended by Ordinance No. 94-30, 00-22, 07-12)

POLICY 143.4.1: Lee County will inventory and prepare a preservation plan for all county-owned historic resources. (Amended by Ordinance No. 00-22)

POLICY 143.4.2: Lee County will consider the acquisition of historic and archaeological resources, where necessary, and in so doing will follow the Standards for Acquisition established by the U.S. Department of the Interior. (Amended by Ordinance No. 00-22)

POLICY 143.4.3: In disposing of county-owned historic and archaeological resources, Lee County will attach a preservation easement or protective covenants to said property. (Amended by Ordinance No. 94-30, 00-22)

GOAL 144: EDUCATION AND PUBLIC PARTICIPATION. To provide for the public awareness and involvement in all aspects of historic preservation in Lee County.

OBJECTIVE 144.1: EDUCATION. Lee County will maintain a public information program with the purpose of educating the public about local history, the Lee County historic preservation program, and the historic preservation incentives. (Amended by Ordinance No. 94-30, 00-22)

POLICY 144.1.1: Lee County will maintain and make available to the public an historic preservation manual to help property owners preserve and maintain their properties consistent with historic preservation standards. (Amended by Ordinance No. 94-30, 00-22)

POLICY 144.1.2: Lee County will continue to develop, in cooperation with local historical groups, programs and displays, maps, tours, and brochures that illustrate Lee County's history and its historic preservation programs. (Amended by Ordinance No. 94-30, 00-22)

POLICY 144.1.3: Lee County will continue to compile, store, and make available to the public published manuals relating to historic preservation. (Amended by Ordinance No. 94-30, 00-22)

POLICY 144.1.4: Lee County will continue to support local historical museums through information and technical assistance. (Amended by Ordinance No. 94-30, 00-22)

POLICY 144.1.5: Lee County, in cooperation with the Lee County School Board, will continue to study the development of historic preservation programs for school-aged children as well as to maintain, as necessary, those programs previously developed. (Amended by Ordinance No. 94-30, 00-22)

POLICY 144.1.6: Lee County, in cooperation with local historic or archaeological groups and the public library, will study the feasibility of establishing a depository for the archival of materials pertaining to the history of Lee County. (Amended by Ordinance No. 00-22)

OBJECTIVE 144.2: PUBLIC PARTICIPATION. Lee County will continue to implement mechanisms for the notification and involvement of historic property owners and the interested public in county historic preservation activities. (Amended by Ordinance No. 94-30, 00-22)

GOAL 145: COORDINATION. To cooperate and coordinate with various private preservation groups and governments to achieve an efficient and responsible system for the exchange of information relating to historic preservation.

OBJECTIVE 145.1: IMPACT REVIEW. Lee County will continue its integration of the review of impacts to historic and archaeological resources into the existing regulatory framework of local and state government agencies. (Amended by Ordinance No. 94-30, 00-22)

POLICY 145.1.1: Provide survey and inventory information to all local and state agencies.

POLICY 145.1.2: All county departments must notify the Lee County Historic Preservation Board of any proposals that would affect a historic resource. The Historic Preservation Board will advise the Board of County Commissioners as to any action they deem appropriate or

perform other duties as specified in a historic preservation ordinance. (Amended by Ordinance No. 00-22)

OBJECTIVE 145.2: RECOGNITION AND REGISTRATION. Assist local and state government agencies in the recognition and registration of the historic resources in Lee County.

POLICY 145.2.1: Participate in the Certified Local Government Program (36 CFR 61.5).

POLICY 145.2.2: Lee County will exert every effort to enter into an interlocal agreement with the municipalities within Lee County to perform shared functions with the Historic Preservation Board. (Amended by Ordinance No. 00-22)

POLICY 145.2.3: Lee County will assist the Lee County School Board in the nomination of eligible school board properties to the National Register of Historic Places. (Amended by Ordinance No. 00-22)

POLICY 145.2.4: The county will consider establishing or supporting a staff position for a county or regional archaeologist to undertake the educational and cultural research requirements of the Lee County archaeological resource base. (Amended by Ordinance No. 00-22)

OBJECTIVE 145.3: EDUCATION. To improve coordination with other governmental agencies in promoting and increasing public awareness of historic resources.

POLICY 145.3.1: Maintain a liaison with the School Board in the establishment of a historic preservation education program.

POLICY 145.3.2: Provide information to those private and public agencies that function to promote the general interest of Lee County for tourism, industry, and commerce.

GOAL 146 - GOAL 150: [RESERVED]

IX. Historic Preservation

(~~strikethrough~~ = delete; underline = add)

GOAL 1: Enhance the quality of life in Lee County by continuing the preservation of historic resources and implementing procedures to preserve scenic and paleontological (fossil) resources.

GOAL 141: IDENTIFICATION AND EVALUATION. ~~To provide for the identification and evaluation of the historic resources of Lee County.~~

OBJECTIVE 141.1.1-1.1: IDENTIFICATION. IDENTIFICATION AND EVALUATION OF HISTORIC RESOURCES: Continue identifying and evaluating historic resources.

Historic resources include prehistoric or historic district, site, building, structure, object or other property of historical, architectural or archaeological value. Historic resources may include but are not limited to monuments, memorials, Indian habitations, ceremonial sites, abandoned settlements, sunken or abandoned ships, and engineering works with intrinsic historical or archaeological value relating to the history, government or culture of the county, the state or the United States. Maintain existing programs to identify the historic and archaeological resources of Lee County, develop new identification programs (such as, but not limited to, a program to identify Lee County resources listed on the National Register of Historic Places), and make information available to the public and other public agencies. (Amended by Ordinance No. 94-30)

POLICY 141.1.1: 1.1.1: ~~Lee County will systematically m~~Maintain the Lee County section of the Florida Master Site File (Florida's official inventory of historical resources) by annual updates, corrections, and monitoring of status of listed properties and reports. New information will be transmitted to the Florida Department of State. (Amended by Ordinance No. 94-30, 00-22)

LDC POLICY 141.1.2-1.1.2: ~~Require all applications for development orders, review, major re-zonings and comprehensive plan amendments to provide an archaeological and historical report in compliance with the standards employed by the Florida Division of Historical Resources and set forth in Chapter 1A-46 Florida Administrative Code to identify the location and status of historic resources(including archaeological sites). The Lee County Historic and Architectural Survey and the Lee County Archaeological Management Plan will serve as data bases. The Historic Preservation Board will advise the Board of County Commissioners as to any action it deems appropriate or perform other duties as specified in the Historic Preservation Ordinance.~~ (Amended by Ordinance No. 00-22)

POLICY 141.1.3: ~~Maintain an automated system merging data regarding properties designated under Lee County Historic Preservation Ordinance into the county's parcel information system and study the feasibility of developing an automated system merging Florida Site File data into the county's parcel information system. (Amended by Ordinance No. 94-30) (See policy 1.2.1)~~

POLICY 141.1.4: ~~Lee County will continue to maintain a streamlined storage and retrieval system of the Florida Site File to allow for fast and easy access and distribution. (Amended by Ordinance No. 94-30, 00-22)~~

POLICY 141.1.5: Lee County will establish a scenic resource identification and evaluation program. (Amended by Ordinance No. 00-22)

OBJECTIVE 141.2: EVALUATION. Continue to evaluate the historic and archaeological resources of Lee County according to adopted criteria for significance. (Amended by Ordinance No. 94-30)

POLICY 141.2.1 1.1.3: Maintain adopted criteria in the Chapter 22 Historic Preservation of the Land Development Code Ordinance for the evaluation of historic and archaeological resources that are consistent with the requirements of the Certified Local Government Program created pursuant to the National Historic Preservation Act of 1966.

POLICY 141.2.2 1.1.4: Evaluate the historic resources of Lee County for eligibility for nomination to the National Register of Historic Places and a local register of historic places designation under Chapter 22 Historic Preservation of the Land Development Code.

OBJECTIVE 1.2: GOAL 142: RECOGNITION AND REGISTRATION. Recognition and designation of historic resources: Continue to formally recognize significant historic resources and provide for their appropriate registration designation, listing or nomination under the or local, state, or national listings, preservation programs.

OBJECTIVE 142.1: RECOGNITION. Lee County will continue to implement a program to formally recognize those historic and archaeological resources that are considered historically and archaeologically significant according to the Lee County Historic Preservation Ordinance. (Amended by Ordinance No. 94-30, 00-22)

POLICY 142.1.1 1.2.1. : Lee County will maintain a local register of historic and archaeological places designated under the Historic Preservation Ordinance. (Amended by Ordinance No. 94-30, 00-22) Continue to maintain a data base of historic resources designated under Chapter 22 Historic Preservation of the Land Development Code and continue to integrate it with the County's permit tracking systems and the Property Appraiser's data base.

POLICY 142.1.2 1.2.2: Lee County will provide Coordinate with public and private entities encouraging the display of plaques and certificates for display on buildings or archaeological sites certifying their historic significance.-(Amended by Ordinance No. 00-22)

POLICY 142.1.3 1.2.3: Lee County will establish a historic marker program with the goal of marking the locations of significant historic resources, the boundaries of historic districts, or archaeological sites. (Amended by Ordinance No. 00-22) Participate in the Florida Historical Marker program to recognize historic resources, persons and events by placing historic markers and plaques at sites of historical and visual interest to visitors to increase public awareness of the area's cultural heritage.

POLICY 142.1.4 1.2.4: Coordinate with nonprofit preservation groups to Lee County will establish an awards program to officially recognize excellence in historic preservation activities. (Amended by Ordinance No. 00-22)

~~**POLICY 142.1.5:** Lee County will distribute certificates of historical and/or archaeological significance to owners of properties designated under the Lee County Historic Preservation Ordinance. (Amended by Ordinance No. 94-30, 00-22)~~

~~**OBJECTIVE 142.2: REGISTRATION.** The county will continue its program to nominate eligible structures, sites, or districts to the National Register of Historic Places. (Amended by Ordinance No. 94-30, 00-22)~~

POLICY 1.2.5: Continue to designate and encourage private and public entities to request designation of eligible historic resources under Chapter 22 Historic Preservation of the Land Development Code. .

POLICY 1.2.6: Continue to submit for listing and encourage private and public entities to submit for listing eligible historic resources under the Florida Master Site File program.

POLICY 1.2.7: Continue to nominate and encourage private and public entities to nominate eligible historic resources to the National Register of Historic Places.

~~**POLICY 142.2.1:** Lee County will initiate the nomination of eligible historic resources to the National Register of Historic Places through the Lee County Historic Preservation Board according to the Certified Local Government program. (Amended by Ordinance No. 00-22)~~

~~**POLICY 142.2.2:** Lee County will encourage historic property owners to nominate eligible structures, sites, or districts to the National Register of Historic Places through the provision of information and technical assistance. (Amended by Ordinance No. 00-22)~~

GOAL 143: LOCAL PRESERVATION TECHNIQUES. OBJECTIVE 1.3: TECHNIQUES TO PRESERVE AND PROTECT HISTORIC RESOURCES: To provide for the protection, preservation, reconstruction, restoration, rehabilitation, and use of the historic resources of Lee County.

~~**OBJECTIVE 143.1: DEVELOPMENT REGULATIONS** **Policy 1.3.1:** Lee County will eContinue to enact, amend, or revise, as appropriate, regulatory measures including the Land Development Code that will to further historic preservation goals and policies as stated in this element and any subsequent revisions thereof and to facilitate the preservation of historic resources designated under Chapter 22 Historic Preservation of the Land Development Code by encouraging creative design solutions including but not limited to the adaptive re-use and redevelopment. (Amended by Ordinance No. 94-30, 00-22)~~

POLICY 1.3.2 Develop an initiative in cooperation with the Lee County Health Department assure implementation of Sect 22-106 (b) of Chapter 22 Historic Preservation Land Development Code which sets forth a the requirement for a certificate of appropriateness for new, replacement or enlargement of existing septic tanks, drainfields or other accessory structures associated with septic tank installation, replacement or enlargement.

POLICY 1.3.3: Study feasibility of minimizing ground disturbing activities on archaeologically significant sites designated under Chapter 22 Historic Preservation Land Development Code under agricultural zoning categories.

POLICY 143.1.1: 1.3.4: ~~Lee County will m~~Maintain in effect a Historic Preservation Ordinance (Chapter 22 Historic Preservation of the Land Development Code) in conformance with the requirements of the Certified Local Government program, which sets forth the requirement for a Historic Preservation Board and the of the Board. Lee County has two Historic Preservation Board which advise the Board of County Commissioners as to any action they deems appropriate or perform as specified in the Historic Preservation Ordinance. (Amended by Ordinance No. 00-22)

POLICY 143.1.2 ~~Lee County will amend the Zoning Regulations and the Development Standards Regulations, as necessary, to incorporate the findings contained within this Historic Preservation element and any subsequent revisions thereof.~~ (Amended by Ordinance No. 94-30, 00-22)

POLICY 143.1.3: ~~The Lee County Building Code will be amended so as to depart from the provisions of the Southern Standard Building Code and applicable fire codes, to the extent permitted by state law and proper safety practices, so as to be consistent with the Historic Preservation Ordinance and any amendment thereof.~~ (Amended by Ordinance No. 94-30, 00-22)

POLICY 143.1.4: ~~County development regulations will be amended in response to the recommendations contained in the Archaeological Zone Management Plan for Lee County (Piper Archaeological Research, Inc., 1987) and in any future update or revision thereof.~~ (Amended by Ordinance No. 94-30, 00-22)

POLICY 143.1.5 1.3.5: ~~Lee County will continue to study the feasibility of various incentives (such as but not limited to transfer of development rights, and property tax relief, leasing of development rights, restrictive covenants etc.) as a means of accomplishing the goals and recommendations of the Historic Preservation element.~~ (Amended by Ordinance No. 94-30, 00-22)

OBJECTIVE 143.2: INNOVATIVE TECHNIQUES. ~~Lee County will continue to make available information, as appropriate, on a variety of legal techniques that will further historic preservation goals and aid in the implementation of the Historic Preservation Ordinance.~~ (Amended by Ordinance No. 94-30, 00-22)

POLICY 143.2.1 1.3.6: ~~Lee County will make information available generally to the public on easements, covenants, options to purchase, right of first refusal, and eminent domain, for historic preservation purposes.~~ (Amended by Ordinance No. 00-22)

POLICY 143.2.2: ~~The County will encourage the preservation of archeological sites and evaluate the preservation of these lands through Leasing of Development Rights (LDRs) and encourage historical tourism, sense of place, and natural areas.~~ (Added by Ordinance No. 07-16)

OBJECTIVE 143.3: INCENTIVES POLICY 143.2.1 1.3.5: ~~continue to implement the Lee County historic preservation grant assistance program its historic preservation maintain a program for the provision of financial incentives for historic preservation purposes.~~ (Amended by Ordinance No. 94-30, 00-22)

POLICY 143.3.1: ~~Lee County will investigate the establishment of a Historic Preservation Trust Fund to be administered by the Board of County Commissioners or a non-profit organization after recommendations by the Historic Preservation Board. The Trust Fund will consist of all monies received from federal and state sources and all monies, if any, appropriated by Lee County, and monies contributed to the fund from any other source. A framework for the administration of the fund will be established. (Amended by Ordinance No. 94-30, 00-22)~~

POLICY 143.3.2-1.3.7: ~~Lee County will continue to seek and make applications for historic and archaeological preservation grants from private, state, and federal sources. Funds will be administered by the Historic Preservation Trust Fund, once established. (Amended by Ordinance No. 00-22)~~

POLICY 143.3.3 1.3.8: ~~Lee County will consider implementation of the historic preservation property tax exemption program to put into effect Sections 196.1997 and 196.1998, Florida Statutes. (Amended by Ordinance No. 94-30, 98-09, 00-22)~~

POLICY 143.3.4: 1.3.9: ~~Lee County will make available Community Development Block Grant funds, when available, for historic preservation purposes especially in blighted historic areas. (Amended by Ordinance No. 00-22)~~

POLICY 143.3.5: ~~Lee County will explore the issuance of low-interest loans for the rehabilitation of historic resources with funds from the Historic Preservation Trust Fund. (Amended by Ordinance No. 00-22)~~

POLICY 143.3.6: ~~Lee County will explore ways in which the historic preservation program and the Community Redevelopment Agency can work together using tax increment financing to restore historic districts in slum or blighted areas. (Amended by Ordinance No. 94-30, 00-22)~~

POLICY 143.3.7: will 1.3.10: ~~Lee County will provide information and technical support in the use of community reinvestment or rehabilitation investment tax credits. (Amended by Ordinance No. 00-22)~~

OBJECTIVE 143.4 1.4: PUBLICLY OWNED SITES.: ~~Lee County will continue to preserve and protect the historic and archaeological resources owned, acquired, or disposed of by Lee County by designating them under the Lee County Historic Preservation Ordinance Chapter 22 Historic Preservation of the Land Development Code if feasible. Lee County will continue the program to preserve and protect those historic and archaeological resources owned, acquired or disposed of by Lee County which do not qualify for designation under the Lee County Historic Preservation Ordinance. (Amended by Ordinance No. 94-30, 00-22, 07-12)~~

POLICY 143.4.1-1.4.1: ~~Lee County will inventory and prepare a preservation plan for all county-owned historic resources and if eligible, designate them under Chapter 22 Historic Preservation of the Land Development Code and list them in the National Register of Historic Places (Amended by Ordinance No. 00-22)~~

POLICY 143.4.2-1.4.2: ~~Lee County will consider the acquisition of historic and archaeological and paleontological (fossil) resources, where necessary, and in so doing will follow the~~

~~Standards for Acquisition established by the U.S. Department of the Interior. (Amended by Ordinance No. 00-22)~~

POLICY 143.4.3-1.4.3: In disposing, selling or transferring of county-owned historic and archaeological resources, Lee County will designate it under Chapter 22 Historic Preservation of the Land Development Code and attach a preservation easement or protective covenants to said property. (Amended by Ordinance No. 94-30, 00-22)

OBJECTIVE 1.5: GOAL 144: EDUCATION AND PUBLIC PARTICIPATION. ~~To provide for the public awareness and involvement in all aspects of historic preservation in Lee County.~~ Encourage public awareness and the involvement of historic property owners and the general public in county historic preservation activities.

~~POLICY 1.5.1: OBJECTIVE 144.1: EDUCATION.~~ Lee County will maintain a public information program with the purpose of educating the public about local history, the Lee County historic preservation program, and the historic preservation incentives. (Amended by Ordinance No. 94-30, 00-22)

~~POLICY 144.1.1-1.5.2:~~ Lee County will maintain and make available to the public an historic preservation manual and other pertinent materials to help property owners preserve and maintain their properties consistent with historic preservation standards. (Amended by Ordinance No. 94-30, 00-22)

POLICY 144.1.2-1.5.3: Lee County will continue to develop, in cooperation with local historical groups, programs and displays, maps, tours, and brochures that illustrate Lee County's history and its historic preservation programs. (Amended by Ordinance No. 94-30, 00-22)

~~POLICY 144.1.3:~~ Lee County will continue to compile, store, and make available to the public ~~published manuals relating to historic preservation.~~ (Amended by Ordinance No. 94-30, 00-22)

POLICY 144.1.4-1.5.4: Lee County will continue to support local historical museums through information and technical assistance. (Amended by Ordinance No. 94-30, 00-22)

~~POLICY 144.1.5~~ Lee County, in cooperation with the Lee County School Board, will continue to study the development of historic preservation programs for school-aged children as well as to maintain, as necessary, those programs previously developed. (Amended by Ordinance No. 94-30, 00-22)

~~POLICY 144.1.6-1.5.5:~~ Lee County, in cooperation with local historic or archaeological groups and the public library, will study the feasibility of establishing a depository for the archival of materials pertaining to the history of Lee County. (Amended by Ordinance No. 00-22)

POLICY 1.5.5.: Support additional outreach to improve the visibility of preservation efforts in the community and highlight the importance of heritage education and heritage tourism.

POLICY 1.5.6: Provide information on the economic impacts of historic preservation on the local economy.

~~**OBJECTIVE 144.2: PUBLIC PARTICIPATION.** Lee County will continue to implement mechanisms for the notification and involvement of historic property owners and the interested public in county historic preservation activities. (Amended by Ordinance No. 94-30, 00-22)~~

~~**GOAL 145: OBJECTIVE 1.6: COORDINATION.** To cooperate and coordinate with various private preservation groups and governments to achieve an efficient and responsible system for the exchange of information relating to historic preservation and to promote and increase public awareness of historic resources.~~

~~**OBJECTIVE 145.1: IMPACT REVIEW.** Lee County will continue its integration of the review of impacts to historic and archaeological resources into the existing regulatory framework of local and state government agencies. (Amended by Ordinance No. 94-30, 00-22)~~

~~**POLICY 145.1.1-1.6.1:** Provide survey and inventory information to all local and state agencies.~~

~~**POLICY 145.1.2-1.6.2:** All county departments ~~must~~ will notify the Lee County Historic Preservation Board of any proposals that would affect a historic resource. The Historic Preservation Board will advise the Board of County Commissioners as to any action they deem appropriate or perform other duties as specified in a historic preservation ordinance. (Amended by Ordinance No. 00-22)~~

~~**OBJECTIVE 145.2: RECOGNITION AND REGISTRATION.** Assist local and state government agencies in the recognition and registration of the historic resources in Lee County.~~

~~**POLICY 145.2.1-1.6.3:** Continue to participate in the Certified Local Government Program (36 CFR 61.5), which is a local, state and federal partnership.~~

~~**POLICY 145.2.2-1.6.4:** Lee County will ~~exert every effort to~~ consider entering ~~enter~~ into an interlocal agreement with the municipalities within Lee County to perform shared functions with the Historic Preservation Board. (Amended by Ordinance No. 00-22)~~

~~**POLICY 145.2.3:** Lee County will assist the Lee County School Board in the nomination of eligible school board properties to the National Register of Historic Places. (Amended by Ordinance No. 00-22)~~

~~**POLICY 145.2.4-1.6.5:** ~~The county will~~ consider establishing or supporting a staff position for a county or regional archaeologist to undertake the educational and cultural research requirements of the Lee County archaeological resource base. (Amended by Ordinance No. 00-22)~~

~~**OBJECTIVE 145.3: EDUCATION.** To improve coordination with other governmental agencies in promoting and increasing public awareness of historic resources.~~

~~**POLICY 145.3.1-1.6.6:** Maintain a liaison with the School Board Lee County School District ~~in~~ to coordinate heritage education activities including the establishment of a historic preservation education program and the nomination of eligible school board properties to the National Register of Historic Places and designation under Chapter 22 Historic Preservation of the Land Development Code.~~

POLICY 145.3.2 1.6.7: Provide information to those private and public agencies that function to promote the general interest of Lee County for tourism, industry, and commerce.

GOAL 146 – GOAL 150: [RESERVED]

OBJECTIVE 1.7 : SUSTAINABLE HISTORIC PRESERVATION: Develop a sustainable historic preservation initiative as historic preservation is inherently sustainable; it maximizes the use of existing materials and infrastructure and historic buildings were designated with sustainable features that responded to the climate and site.

POLICY 1.7.1 Develop a public information program with the purpose of educating and disseminating “The Secretary of the Interior’s Standards for Rehabilitation & Illustrated Guidelines on Sustainability for Rehabilitating Historic Buildings” these are the first official guidelines on how to make changes to improve energy efficiency and preserve the character of historic buildings.

POLICY 1.7.2 Develop a collaborative partnership between government agencies, preservationists and the private sector to create initiatives that transform historic preservation into a leading, relevant and timely exemplar for sustainability.

LDC OBJECTIVE 1.8: PALEONTOLOGICAL (FOSSIL) PRESERVATION: Develop a paleontological (fossil) preservation initiative to protect significant paleontological sites from destruction in the absence of appropriate preservation, analysis, or mitigation.

POLICY 1.8.1: Develop paleontological preservation regulations.

POLICY 1.8.2: Contact the Florida Museum of Natural History pursuant to FS 240.516 on areas of known or potential paleontological significance for recommendation on the need to conduct an assessment survey for potentially significant paleontological resources. Development Orders for such areas may be conditioned to accomplish the following:

- a. Insure proper paleontological investigation prior to construction and where appropriate implement avoidance, minimization and mitigation of impacts.
- b. Preserve and provide perimeter buffering around paleontological sites.

POLICY 1.8.3: Establish a program to increase public awareness about the significance of paleontological resources.

LDC OBJECTIVE 1.9: SCENIC PRESERVATION: Identify, protect and enhance visual access to and enjoyment of natural resources and vistas with significant scenic value through the implementation of a scenic preservation program.

POLICY 1.9.1: Establish a scenic resource identification and evaluation program.

POLICY 1.9.2: Implement Land Development Regulations that ensure that scenic resources and vistas are reasonably maintained through development criteria, design standards and review procedures.

IX. Historic Preservation (Proposed)

GOAL 1: Enhance the quality of life in Lee County by continuing the preservation of historic resources and implementing procedures to preserve scenic and paleontological (fossil) resources.

OBJECTIVE 1.1: IDENTIFICATION AND EVALUATION OF HISTORIC

RESOURCES : Continue identifying and evaluating historic resources. Historic resources include prehistoric or historic district, site, building, structure, object or other property of historical, architectural or archaeological value. Historic resources may include but are not limited to monuments, memorials, Indian habitations, ceremonial sites, abandoned settlements, sunken or abandoned ships, and engineering works with intrinsic historical or archaeological value relating to the history, government or culture of the county, the state or the United States.

POLICY 1.1.1: Maintain the Lee County section of the Florida Master Site File (Florida's official inventory of historical resources) by updates, corrections, and monitoring of status of listed properties and reports. New information will be transmitted to the Florida Department of State. (Amended by Ordinance No. 94-30, 00-22)

LDC POLICY 1.1.2: Require applications for development orders, major re-zonings and comprehensive plan amendments to provide an archaeological and historical report in compliance with the standards employed by the Florida Division of Historical Resources and set forth in Chapter 1A-46 Florida Administrative Code. (Amended by Ordinance No. 00-22)

POLICY 1.1.3: Maintain adopted criteria in Chapter 22 Historic Preservation of the Land Development Code for the evaluation of historic and archaeological resources that are consistent with the requirements of the Certified Local Government Program created pursuant to the National Historic Preservation Act of 1966.

POLICY 1.1.4: Evaluate historic resources for eligibility for nomination to the National Register of Historic Places and designation under Chapter 22 Historic Preservation of the Land Development Code.

OBJECTIVE 1.2: Recognition and designation of historic resources: Continue to formally recognize significant historic resources and provide for their appropriate designation, listing or nomination under the local, state, or national preservation programs.

POLICY 1.2.1.: Continue to maintain a data base of historic resources designated under Chapter 22 Historic Preservation of the Land Development Code and continue to integrate it with the County's permit tracking systems and the Property Appraiser's data base.

POLICY 1.2.2: Coordinate with public and private entities encouraging the display of plaques and certificates on buildings or archaeological sites certifying their historic significance. (Amended by Ordinance No. 00-22)

POLICY 1.2.3: Participate in the Florida Historical Marker program to recognize historic resources, persons and events by placing historic markers and plaques at sites of historical and visual interest to visitors to increase public awareness of the area's cultural heritage.

POLICY 1.2.4: Coordinate with nonprofit preservation groups to establish an awards program to officially recognize excellence in historic preservation activities. (Amended by Ordinance No. 00-22)

POLICY 1.2.5: Continue to designate and encourage private and public entities to request designation of eligible historic resources under Chapter 22 Historic Preservation of the Land Development Code. .

POLICY 1.2.6: Continue to submit for listing and encourage private and public entities to submit for listing eligible historic resources under the Florida Master Site File program.

POLICY 1.2.7: Continue to nominate and encourage private and public entities to nominate eligible historic resources to the National Register of Historic Places.

OBJECTIVE 1.3: TECHNIQUES TO PRESERVE AND PROTECT HISTORIC RESOURCES: To provide for the protection, preservation, reconstruction, restoration, rehabilitation, and use of the historic resources of Lee County.

POLICY 1.3.1: Continue to enact, amend, or revise, as appropriate, regulatory measures including the Land Development Code to further historic preservation goals and policies as stated in this element and any subsequent revisions thereof and to facilitate the preservation of historic resources designated under Chapter 22 Historic Preservation of the Land Development Code by encouraging creative design solutions including but not limited to the adaptive re-use and redevelopment. (Amended by Ordinance No. 94-30, 00-22)

POLICY 1.3.2: Develop an initiative in cooperation with the Lee County Health Department assure implementation of Sect 22-106 (b) of Chapter 22 Historic Preservation Land Development Code which sets forth a the requirement for a certificate of appropriateness for new, replacement or enlargement of existing septic tanks, drainfields or other accessory structures associated with septic tank installation, replacement or enlargement.

POLICY 1.3.3: Study feasibility of minimizing ground disturbing activities on archaeologically significant sites designated under Chapter 22 Historic Preservation Land Development Code under agricultural zoning categories.

POLICY 1.3.4: Maintain in effect a Historic Preservation Ordinance (Chapter 22 Historic Preservation of the Land Development Code) in conformance with the requirements of the Certified Local Government program, which sets forth the requirement for a Historic Preservation Board and the of the Board. Lee County has two Historic Preservation Board which advise the Board of County Commissioners as to any action they deems appropriate or perform as specified in the Historic Preservation Ordinance- (Amended by Ordinance No. 00-22)

POLICY 1.3.5: Continue to study the feasibility of various incentives (such as but not limited to transfer of development rights, property tax relief, leasing of development rights, restrictive covenants etc.) as a means of accomplishing the goals and recommendations of the Historic Preservation element. (Amended by Ordinance No. 94-30, 00-22)

POLICY 1.3.6: Make information available to the public on easements, covenants, options to purchase, right of first refusal, and eminent domain, for historic preservation purposes. (Amended by Ordinance No. 00-22)

POLICY 1.3.5: Continue to implement the Lee County historic preservation grant assistance program.

POLICY 1.3.7: Continue to seek and make applications for historic and archaeological preservation grants from private, state, and federal sources. (Amended by Ordinance No. 00-22)

POLICY 1.3.8: Consider implementation of the historic preservation property tax exemption program to put into effect Sections 196.1997 and 196.1998, Florida Statutes. (Amended by Ordinance No. 94-30, 98-09, 00-22)

POLICY 1.3.9: Make available Community Development Block Grant funds, when available, for historic preservation purposes especially in blighted historic areas. (Amended by Ordinance No. 00-22)

POLICY 1.3.10: Lee County will provide information and technical support in the use of community reinvestment or rehabilitation investment tax credits. (Amended by Ordinance No. 00-22)

OBJECTIVE 1.4: PUBLICLY OWNED SITES: Continue to preserve and protect the historic and archaeological resources owned, acquired, or disposed of by Lee County by designating them under Chapter 22 Historic Preservation of the Land Development Code if feasible. Lee County will continue to preserve and protect those historic and archaeological resources owned, acquired or disposed of by Lee County which do not qualify for designation under the Lee County Historic Preservation Ordinance. (Amended by Ordinance No. 94-30, 00-22, 07-12)

POLICY 1.4.1: Inventory and prepare a preservation plan for all county-owned historic resources and if eligible, designate them under Chapter 22 Historic Preservation of the Land Development Code and list them in the National Register of Historic Places (Amended by Ordinance No. 00-22)

POLICY 1.4.2: Consider the acquisition of historic, archaeological and paleontological (fossil) resources. (Amended by Ordinance No. 00-22)

POLICY 1.4.3: In disposing, selling or transferring county-owned historic and archaeological resources, Lee County will designate it under Chapter 22 Historic Preservation of the Land Development Code and attach a preservation easement or protective covenants to said property. (Amended by Ordinance No. 94-30, 00-22)

OBJECTIVE 1.5: EDUCATION AND PUBLIC PARTICIPATION. Encourage public awareness and the involvement of historic property owners and the general public in county historic preservation activities.

POLICY 1.5.1.: Maintain a public information program with the purpose of educating the public about local history, the Lee County historic preservation program, and the historic preservation incentives. (Amended by Ordinance No. 94-30, 00-22)

POLICY 1.5.2: Maintain and make available to the public an historic preservation manual and other pertinent materials to help property owners preserve and maintain their properties consistent with historic preservation standards. (Amended by Ordinance No. 94-30, 00-22)

POLICY 1.5.3: Lee County will continue to develop, in cooperation with local historical groups, programs and displays, maps, tours, and brochures that illustrate Lee County's history and its historic preservation programs. (Amended by Ordinance No. 94-30, 00-22)

POLICY 1.5.4: Lee County will continue to support local historical museums through information and technical assistance. (Amended by Ordinance No. 94-30, 00-22)

POLICY-1.5.5: In cooperation with local historic or archaeological groups and the public library, will study the feasibility of establishing a depository for the archival of materials pertaining to the history of Lee County. (Amended by Ordinance No. 00-22)

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OBJECTIVE 1.6: COORDINATION. Cooperate and coordinate with various private preservation groups and governments to achieve an efficient and responsible system for the exchange of information relating to historic preservation and to promote and increase public awareness of historic resources.

POLICY 1.6.1: Provide survey and inventory information to local and state agencies.

POLICY 1.6.2: All county departments will notify the Lee County Historic Preservation Board of any proposals that would affect a historic resource. The Historic Preservation Board will advise the Board of County Commissioners as to any action they deem appropriate or perform other duties as specified in a historic preservation ordinance. (Amended by Ordinance No. 00-22)

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POLICY 1.6.4: Lee County will consider entering into an interlocal agreement with the municipalities within Lee County to perform shared functions with the Historic Preservation Board. (Amended by Ordinance No. 00-22)

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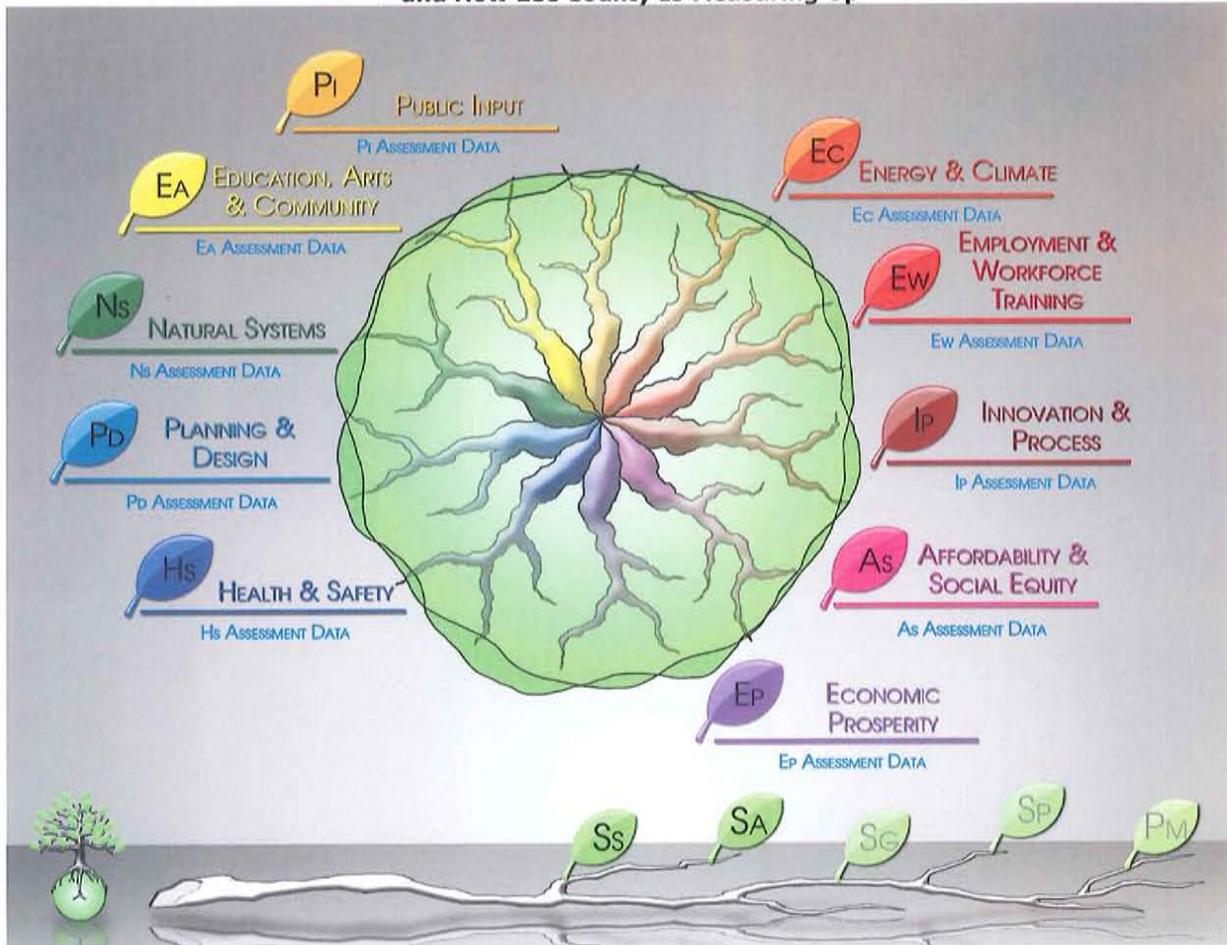
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Discover the Qualities of a Sustainable Community – and How Lee County Is Measuring Up



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Planning & Design S.E.E. Synergies

SOCIETY ECONOMY ENVIRONMENT

Advancing compact development patterns to increase multi-modal transportation opportunities promotes access to employment, active lifestyles, and economic growth

Developing and upholding ecologically appropriate land use policy to preserve green space increases the economic benefits of tourism and property values

Creating strong connections to promote community character cultivates a sense of community and increases the desirability of centers and neighborhoods

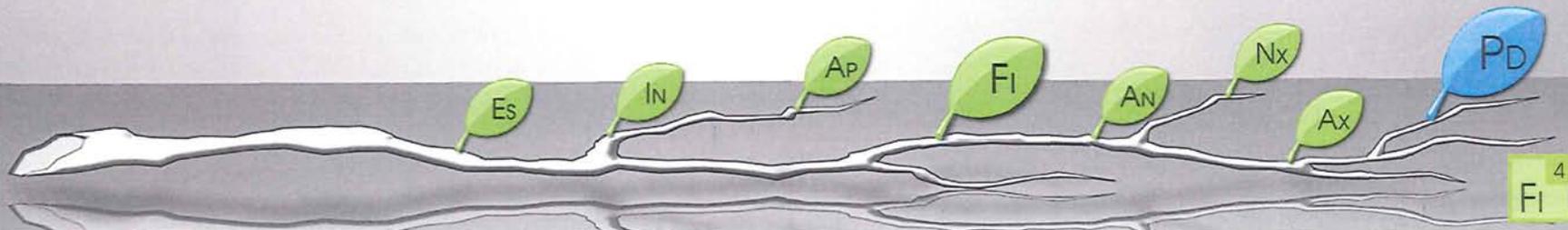
Summary of Planning & Design Findings

Creating and enhancing a vibrant community requires the combined disciplines of planning and sustainability. Implicit in the word "sustain" is the desire for human societies to remain healthy far into the future – beyond the 10- to 20-year time horizon that is typical of planning policies. Recognizing that our current development patterns and practices are greater than the planet can support makes it important to consider the impacts of planning decisions into the next 50, 100, or even 200 years, so the needs of future generations can be met.

Our success will be measured by our ability to look forward and to make our decisions based on our community's long-term vision. Sustainable planning requires a holistic and interdisciplinary approach, meshing conventional practices with separate specialties. Just as transportation planning will need to be coordinated with land use, housing, air quality, and social equity concerns, on a broader scale, our decisions require consideration of the neighborhood, the County, the region, the nation, and the planet.



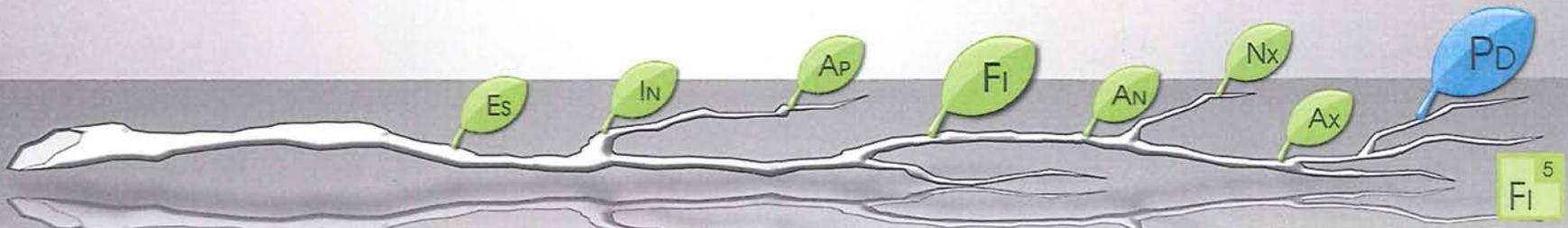
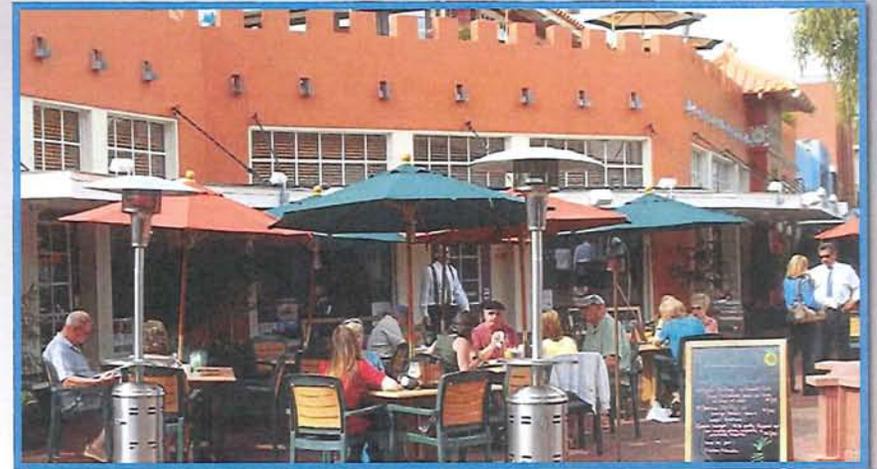
Recent movements such as smart growth and new urbanism seek such integration. Smarter and more ecologically appropriate land use policy provides for the preservation of agricultural lands and natural or sensitive lands. This preservation creates parks, greenways and blueways that provide both ecological and recreational benefit to a community, as well as preservation of agricultural lands that can provide a local food source and jobs. Compact, contiguous development patterns provide multi-modal transportation choices and offer residents local destinations to serve their needs, providing affordable, well-located and energy efficient housing that is accessible to all socio-economic levels. Striving for balance between a globalized and a place-based economy supports small, local businesses. All of these elements promote social vitality, improved public health and a sense of community.



By creating long-term policies that uphold these concepts, Lee County can ensure community-wide opportunities for adequate and affordable housing; decent-paying, meaningful jobs; and access to education and social services while securing long-term economic vitality of the community. Transparency in local decision making is critical, as it allows local constituencies to shape their own future and to take ownership in the policies that shape the future of their community.

Planning & Design Findings Analysis

Lee County has already made significant strides through planning efforts that establish a direction toward a more sustainable community. Through recently adopted policy that encourages a mix of uses and complete streets, and our ongoing preservation program (Conservation 20/20), the County's sustainability efforts are underway. The New Horizon 2035 public participation process demonstrated our ability to provide a transparent planning process that invites all members of the community to get involved and have a voice, encouraging cross-disciplinary linkages and more active engagement of stakeholders. Success of this effort will, in particular, require a stronger link between our land planning efforts and the long-term planning of economic development programs and activities that will support the vision of growth for the community. The collaboration of these two efforts will ensure that the future plan for Lee County endorses the community's desire to become a more sustainable place to live, learn, work, and play.



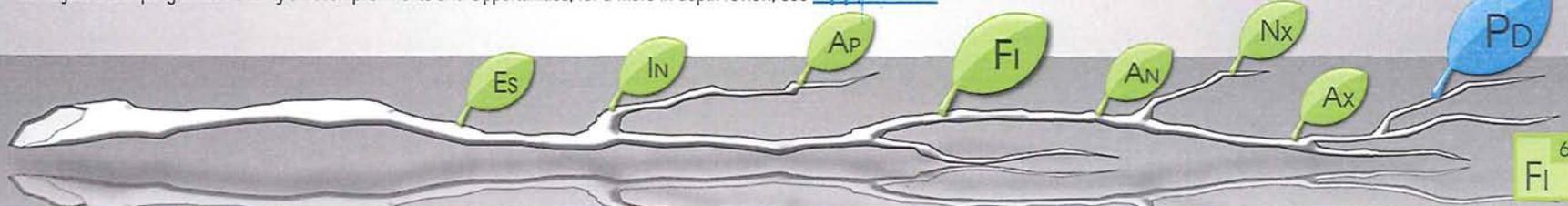


- Created organizational framework and hired sustainability director, and developed Sustainability Strategic Plan
- Complete Streets Resolution 09-11-13
- Lee Plan and EAR New Horizon 2035
- Compact Communities zoning district promotes compact, walkable development
- Neighborhood Building Program – facilitates programs that address accessibility
- Carpool program/Park & Ride/ hybrid vehicles for County use
- Lee County Master Mitigation Plan (Environmental Quality Investment and Growth Mitigation Strategic Plan)
- Housing rehabilitation projects consider environmental impact, financial efficiency and social equity
- Transit Development Plan
- LeeScape Plan

- Strengthen and incentivize redevelopment and infill projects
- Promote and raise awareness for alternative transportation
- Encourage walkable communities
- Strategically execute land preservation efforts to support the urban/suburban/rural land use context envisioned through Horizon 2035
- Recognize and promote real property rights to ensure appropriate development patterns
- Become efficient and economical in the process of development
- Establish a Health Element in the Lee Plan
- Provide access to healthy, locally grown food; promote community gardens
- Collaborate with other community planning initiatives
- Create a consortium of agencies and organizations with a single mission to advance sustainability in Lee County
- Partner with local universities to implement sustainability strategy
- Raise awareness of local foods and encourage growth of food in backyards
- Focus on long term change, with short term impact becoming secondary



This is just a sampling of Lee County's Accomplishments and Opportunities, for a more in depth review, see [Appendix A](#)





Goal Icon:

CLICK the leaf icon throughout Appendix to return to the FINDINGS for this section.

Provide a long-range vision for the future growth & development of the community that addresses economic, environmental & social problems & opportunities within the community; ensure public & encourage private investments are supportive of that vision.

PARTNERS	ACCOMPLISHMENTS	OPPORTUNITIES
Community Development (DCD) – Development Services	<p>Lee Plan lays out community plan overlays indicating what each community ultimately wants to look like from a future overlay and zoning perspective. This sets up green spaces connectivity points and the goal is that through these connectivity points a balance between development and open space will be met.</p> <p>Land Development Code (LDC) in general addresses compatibility between developments.</p>	<p>Re-evaluate stormwater criteria in urban areas and promote walkability through the implementation of Complete Streets.</p> <p>Review best practices and utilize best practices to update the Lee Plan as part of New Horizon 2035.</p>
DCD -ES	<p>Discourage development in unique habitats and flowways.</p> <p>LDC 10-416(d)(9) Development abutting natural waterway. Except where Chapter 33 provides a stricter standard for Greater Pine Island (as defined in Goal 14 of the Lee Plan and in section 33-1002), there must be a 50 foot wide vegetative buffer landward of non-seawalled natural waterways as measured from the mean high water line or top of bank, whichever is further landward.</p> <p>a. In residential subdivisions, the buffer must be located within a common area or tract, and outside of all private property boundaries. Location of the buffers in accordance with this section will not prevent the issuance of residential dock permits meeting the requirements of section 26-71(g) or prohibit use of the buffer area for passive recreational uses.</p> <p>b. Existing native vegetation within the buffer area must be retained. The natural waterway buffer must include, at minimum, six native canopy trees and 50 native shrubs per 100 linear feet, which may be met through credits from the existing native vegetation within the waterway buffer area at a 1:1 credit ratio. If existing native vegetation is not present to meet the buffer vegetation standards a planting plan must be submitted to environmental sciences for review prior to local development order approval. All proposed plantings within the natural waterway buffer area must be installed to mimic a natural system, and all plantings must comply with the plant standards set forth in section 10-420. The use of heavy mechanical equipment such as bulldozers front end loaders, hydraulic excavators, or similar equipment is prohibited, unless prior written approval is obtained from the County.</p>	<p>Evaluate opportunities to connect wildlife habitats.</p> <p>Avoid severing flowways or recreating flowways after development has blocked natural flow.</p>



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DCD -ES	<p>Discourage development in unique habitats and flowways.</p> <p>LDC 10-416(d)(9) Development abutting natural waterway. Except where Chapter 33 provides a stricter standard for Greater Pine Island (as defined in Goal 14 of the Lee Plan and in section 33-1002), there must be a 50 foot wide vegetative buffer landward of non-seawalled natural waterways as measured from the mean high water line or top of bank, whichever is further landward.</p> <p>a. In residential subdivisions, the buffer must be located within a common area or tract, and outside of all private property boundaries. Location of the buffers in accordance with this section will not prevent the issuance of residential dock permits meeting the requirements of section 26-71(g) or prohibit use of the buffer area for passive recreational uses.</p> <p>b. Existing native vegetation within the buffer area must be retained. The natural waterway buffer must include, at minimum, six native canopy trees and 50 native shrubs per 100 linear feet, which may be met through credits from the existing native vegetation within the waterway buffer area at a 1:1 credit ratio. If existing native vegetation is not present to meet the buffer vegetation standards a planting plan must be submitted to environmental sciences for review prior to local development order approval. All proposed plantings within the natural waterway buffer area must be installed to mimic a natural system, and all plantings must comply with the plant standards set forth in section 10-420. The use of heavy mechanical equipment such as bulldozers front end loaders, hydraulic excavators, or similar equipment is prohibited, unless prior written approval is obtained from the County.</p>	<p>Evaluate opportunities to connect wildlife habitats.</p> <p>Avoid severing flowways or recreating flowways after development has blocked natural flow.</p>

Solid Waste	The Waste to Energy Facility is sited and permitted under the Clean Air Act (CAA) and meets extensive regulations for air emissions. The current bond rating remains stable (AAA).	
Transportation (DOT)	<p>DOT currently collaborates with the Metropolitan Planning Organization, conducts Capital Improvement Project planning, and conducts Planning Design and Engineering Studies to promote excellence in design.</p> <p>DOT provides leadership in implementing the county's Complete Streets resolution, which includes leading the Complete Streets interdepartmental performance team. Part of the implementation Complete Streets required the development of a revised planning and budgeting process. The framework for this revised process has been drafted and will be implemented to promote a holistic approach to transportation planning that will ensure all perspectives and design issues are considered when making transportation decisions.</p>	<p>Explore opportunities to address public involvement more comprehensively, e.g. from project inception to completion, targeting a wider variety of residents, etc.</p> <p>Review best practices and utilize best practices to update the Lee Plan as part of New Horizon 2035.</p> <p>Identify street segments with multiple planned County projects and planning the improvements to be completed simultaneously.</p>
VCB	Ordinance 10-31: Tourist Development Tax revenues fund capital improvement projects through the Beach & Shoreline program (26.4%) and the Stadium debt fund (20%)	

INTERCONNECTED LAND USE



Encourage diverse, accessible, & proximate land uses to promote active living & access to vital services including employment, education, & healthy food.

PARTNERS	ACCOMPLISHMENTS	OPPORTUNITIES
Community Development (DCD) – Planning	<p>Compact Communities Code Pilot Projects:</p> <p>North Fort Myers Town Center: The development of a Form-Based Code for the North Fort Myers Town Center, which is to be located along US 41 between the Caloosahatchee River and Pondella Road. The goal of this project is develop a future development plan that emphasizes the center's function, form, and scale rather than use, building setbacks, and more standard conventional zoning approaches. In doing so, the community seeks to establish an interconnected center that provides diverse opportunities for residents, business people, and visitors.</p> <p>Lehigh Acres Community Centers: Utilize the Lee County Compact Communities Code to promote mixed-use centers in the central part of the Lehigh Acres Community located in the area where Lee Boulevard, Homestead Road, and Joel Boulevard connect. As a result of this effort, Lehigh Acres will utilize form based development standards to spur development of a mixed-use downtown center, community center, and neighborhood center and in doing so help spur the development of economic, cultural, and social areas within this predominantly residential community.</p>	<p>Establish a form and character design component of the Lee Plan, which addresses need to improve connectivity and supports the ideals of traditional neighborhood design. Establish a Health Element in the Lee Plan to promote healthy communities, including access to healthy and, where ever possible, locally grown food. Develop goals, objectives, and policies in the Vision, Future Land Use, Communities, Housing, Transportation, Community Facilities and Services, and Parks, Recreation, and Open Space Elements which support the desired development form and design character of the county.</p> <p>Target additional locations to implement the Compact Communities Code.</p> <p>Implementation of Complete Streets and prioritization of divers, accessible, and proximate land uses.</p>
DCD - Zoning	<p>LDC Chapter 32 – The Compact Communities code was adopted to promote compact walkable neighborhoods and mixed-use centers within the Density Reduction/Groundwater Resource future land use area of Lee County.</p> <p>Allowing live-work where appropriate.</p>	Implement the Compact Communities Code beyond current designated areas

Human Services	Neighborhood Building Program : Establishes projects that include sidewalks, play grounds, and bike trails in existing neighborhoods	Expand projects to include community gardens.
Parks and Recreation (P&R)	<p>The Lee County Greenways Master Plan provides a framework for the implementation of a comprehensive greenway system for use by Lee County residents and visitors. The greenways offer regional links to adjacent counties to the north, south and to the east, thereby enhancing the statewide greenway system. The</p> <p>greenway trails serve as the major spines or routes thereby allowing smaller arterial linkages and area bicycle pedestrian projects to link to a major greenway system. This will establish an alternative transportation network by creating connections for people to move about safely throughout the County for recreation, enjoying the outdoors, shopping, and getting to school or work.</p>	



COMPACT & COMPLETE COMMUNITIES

Create compact communities with a range of services that allow for amenities & transportation options; afford equitable access to the ingredients of what makes for an economically & socially viable neighborhood; reduce the community's carbon footprint.

PARTNERS	ACCOMPLISHMENTS	OPPORTUNITIES
DCD – Planning	<p>Lee Plan Goal 1: Future Land Use Map. To maintain and enforce a Future Land Use Map showing the proposed distribution, location, and extent of future land uses by type, density, and intensity in order to protect natural and man-made resources, provide essential services in a cost-effective manner, and discourage urban sprawl.</p> <p>Goal 2: Growth Management. To provide for an economically feasible plan that coordinates the location and timing of new development with the provision of infrastructure by government agencies, private utilities, and other sources.</p> <p>Goal 4: Sustainable Development Design. To pursue or maintain land development regulations which encourage creative site designs and mixed use developments. Using an overlay, locate appropriate areas for Mixed Use, Traditional Neighborhood Development, and Transit Oriented Development.</p> <p>Goal 5: Residential Land Use. To provide sufficient land in appropriate locations on the Future Land Use Map to accommodate the projected population of Lee County in the year 2030 in attractive and safe neighborhoods with a variety of price ranges and housing types.</p> <p>Goal 6: Commercial Land Use. To permit orderly and well-planned commercial development at appropriate locations within the county.</p>	<p>Review best practices and utilize best practices to update the Lee Plan as part of New Horizon 2035.</p> <p>Establish a form and character design component of the Lee Plan. Target locations to implement the Compact Communities Code.</p> <p>Strengthen and incentivize redevelopment and infill in urban areas.</p>

Objectives 21.2: *Commercial Land Uses.* Existing and future county regulations, land use interpretations, policies, on-going approvals, and administrative actions should be undertaken in an effort to promote the goal of commercial redevelopment along SR 80 and increased commercial opportunities to service the needs of the Caloosahatchee Shores Community and surrounding areas. County regulations should attempt to ensure that commercial areas maintain a unified and pleasing aesthetic/visual quality in landscaping, architecture, lighting and signage. Commercial land uses must be designed to be compatible with and further the historic character and identity of existing rural Old Florida and Florida Vernacular styles of architecture and the historic identity of Olga.

Objective 23.2: *Commercial Land Uses.* Existing and future county regulations, land use interpretations, policies, zoning approvals, and administrative actions must recognize the unique conditions and preferences of the Palm Beach Boulevard Community to ensure that commercial areas maintain a unified and pleasing aesthetic/visual quality in landscaping, architecture, lighting and signage and provide for employment opportunities. Uses that are not compatible with adjacent uses or those that have significant adverse impacts on natural resources will be discouraged.

Objective 27.6: *Transportation.* All road improvements within the Page Park Community considered by the County will address the Community's goal to maintain its small town character and give preference to alternatives that allow existing roads to function at their current capacity.

Objective 28.2: *Land Use: Centers and Corridors.* Identify and pursue Town Center overlay districts, road corridor overlay districts and redevelopment areas.

Objective 31.3: *Commercial Land Uses.* Ensure that new development areas create a unified and pleasing aesthetic/visual quality through landscaping, architecture, lighting, and signage, while providing additional employment opportunities, and eliminating uses that are not compatible with the adjacent uses. Existing and future county regulations, land use interpretations, policies, zoning approval, and administrative actions should be undertaken in an effort to promote the goal of redevelopment for the areas with increases mixed use opportunities to service the needs of the community and surrounding areas. Commercial land uses must be designed to be compatible Old Florida or other Florida Vernacular styles of architecture and the historic identity of the area.

Objectives 31.6: *Coordination of Mass Transit.* The developer(s) will coordinate with Lee County to ensure consistency with the Transit Development Plan (TDP).

Objective 32.5: *Neighborhood Mixed Use Activity Center.* Are areas of sufficient size and location that will help to contribute the uses needed to support large portions of the Lehigh Acres Planning Community including: residential; public and private education; live-work; retail; office; medical; entertainment; light industrial; commercial/public parking; parks; and , other civic uses. These locations are identified on Map 1.

DCD – Planning (cont.)	<p><u>Objectives 32.6: Local Mixed Use Activity Centers.</u> Are areas located within existing and emerging residential neighborhoods that are intended to support the local daily commercial needs of the neighborhood. Local Activity Centers are envisioned as floating designations that may be applied for as part of a rezoning.</p> <p><u>New Horizon 2035:</u> Comprehensive Review of the Lee Plan through the year 2035. Executive Summary, Vision Framework, and Chapters 3 and 4 of this report provide the foundation for amendments to the Lee Plan that promote compact and complete communities.</p>	
DCD – Zoning	<p><u>LDC Chapter 32 Compact Communities</u> - The intent of chapter 32 is to create compact walkable neighborhoods and mixed-use centers using form-based code techniques. Design goals and principles include: (1) A compact physical form with identifiable centers and edges, with opportunities for shopping and workplaces near residential neighborhoods; (2) A highly interconnected street network, to disperse traffic and provide convenient routes for pedestrians and bicyclists; (3) High-quality public spaces, with building façades having windows and doors facing tree-lined streets, plazas, squares, or parks; (4) A variety of building types, street types, open spaces, and land uses providing for people of all ages and every form of mobility; and (5) Resiliency and sustainability, allowing adaptation over time to changing economic conditions and broader transportation options. Planned developments are also encouraged to create subunits, neighborhoods or internal communities which promote pedestrian activity and community interaction. Also, a fundamental principle of planned development design is the creative use of the open space requirement to produce an architecturally integrated human environment and to not create or increase hazards to persons or property whether on or off the site.</p>	Revise the <u>LDC</u> to promote sustainable communities, complete streets, and compact development.
Department of Health (DOH)/Fit-Friendly SWFL	Fit-Friendly SWFL Strategic Plan provides for opportunities for the health community to advocate for community design that promotes active transportation.	Expand opportunities to advocate for active transportation options throughout Lee County and the region.
Economic Development (EDO)		Assist in growth recruiting, diversifying, & maintaining businesses, promote alternative transportation redevelopment and infill.
Sustainability	<p><u>Lee County Greenhouse Gas Emissions Inventory CY 2007:</u> The inventory was completed in 2010 to establish the baseline emissions data for the Lee Count, FL, as well as Lee County as an organization</p>	<p>Explore carbon costs/return on investment for future projects.</p> <p>Explore goals related to off-setting the county's emissions through program efficiencies, sustainable construction and design, new technology, and renewable energy credits.</p> <p>Explore opportunities to promote public education around emissions and reduce emissions communitywide.</p> <p>Establish collaborative relationships with municipalities within Lee County to promote emissions reductions.</p> <p>Set Greenhouse Gas (GHG) emission reduction targets.</p>
Transportation (DOT)	Retrofit of sidewalks and traffic calming devices in older platted neighborhoods, specifically those identified as the highest priority by the community.	Development of street design standards to improve access to transit, enhance walkability, and promote bicycle usage.



Create human-scale built environments that provide comfort, safety, accessibility & are pleasing to all human inhabitants.

PARTNERS	ACCOMPLISHMENTS	OPPORTUNITIES
DCD – Environmental Sciences	<p>Land Development Code (LDC) Chapter 33 The Estero Planning Community encourages sidewalk linkages between projects.</p>	<p>More effort must be made to encourage walk-able communities within already established neighborhoods so that residents may walk to commercial establishments.</p>
DCD – Planning	<p>Lee Plan Goal 4: Sustainable Development Design. To pursue or maintain land development regulations which encourage creative site designs and mixed use developments. Using an overlay, locate appropriate areas for Mixed Use, Traditional Neighborhood Development, and Transit Oriented Development.</p> <p>Objectives 32.6: Local Mixed Use Activity Centers. Are areas located within existing and emerging residential neighborhoods that are intended to support the local daily commercial needs of the neighborhood. Local Activity Centers are envisioned as floating designations that may be applied for as part of a rezoning.</p> <p>Objective 32.9: Transportation, Parking, and Traffic Circulation. Lee County will work to improve transportation, parking, and circulation within the Lehigh Acres Planning Community.</p> <p>Objective 39.1: Development Impacts. The county will maintain and enforce development regulations to ensure that impacts of development approvals occur concurrently with adequate roads, and to achieve maximum safety, efficiency, and cost effectiveness.</p> <p>Objective 40.1: Protection of Roadway Capacity. The county will protect the capacity and operational ability of county-maintained roadways, through the enforcement of access control, connection separation and other methods.</p> <p>Objective 40.4: Other Modes of Transportation. When conducting all transportation planning and engineering studies, consider the needs and opportunities to allow and encourage the use of all modes of transportation.</p> <p>New Horizon 2035: Comprehensive Review of the Lee Plan through the year 2035. Executive Summary, Vision Framework, and Chapters 3 and 4 of this report provide the foundation for amendments to the Lee Plan that promote compact and complete communities, promoting human scale.</p>	<p>Review best practices and utilize best practices to update the Lee Plan as part of New Horizon 2035.</p> <p>Establish a form and character design component of the Lee Plan which is focused on the development of distinct urban, suburban, and rural places. The element should provide a framework for how the county can ensure the different places in the county to promote connectivity, housing options, public spaces, and mixture of uses.</p> <p>Target locations to implement the Compact Communities Code.</p>
DCD – Zoning	<p>Recommend projects that are compatible with surrounding areas.</p> <p>LDC Chapter 32; LDC 34-411 - The intent of chapter 32 is to create compact walkable neighborhoods and mixed-use centers using form-based code techniques. Design goals and principles include: (1) A compact physical form with identifiable centers and edges, with opportunities for shopping and workplaces near residential neighborhoods; (2) A highly interconnected street network, to disperse traffic and provide convenient routes for pedestrians and bicyclists; (3) High-quality public spaces, with building façades having windows and doors facing tree-lined streets, plazas, squares, or parks; (4) A variety of building types, street types, open spaces, and land uses providing for people of all ages and every form of mobility; and (5) Resiliency and</p>	<p>Revise the LDC to promote sustainable communities, complete streets, and compact development.</p> <p>Create LDC for communities to address specific needs related to comfort, safety, accessibility, and aesthetics.</p>

DCD – Zoning (cont.)	sustainability, allowing adaptation over time to changing economic conditions and broader transportation options. Planned developments are also encouraged to create subunits, neighborhoods or internal communities which promote pedestrian activity and community interaction. Also, a fundamental principle of planned development design is the creative use of the open space requirement to produce an architecturally integrated human environment and to not create or increase hazards to persons or property whether on or off the site.	
Human Services	<u>Neighborhood Building Program</u> : Facilitates projects that include sidewalks which increases and improves safety and accessibility for neighborhood residents.	
Parks and Recreation (P&R)	The <u>Lee County Greenways Master Plan</u> provides a framework for the implementation of a comprehensive greenway system for use by Lee County residents and visitors. The greenways offer regional links to adjacent counties to the north, south and to the east, thereby enhancing the statewide greenway system. The greenway trails serve as the major spines or routes thereby allowing smaller arterial linkages and area bicycle pedestrian projects to link to a major greenway system. This will establish an alternative transportation network by creating connections for people to move about safely throughout the County for recreation, enjoying the outdoors, shopping, and getting to school or work.	
Transit	Improvements are being made to transit infrastructure, specifically the construction of passenger waiting shelters that are fully accessible with solar lighting, bike racks and wheelchair accommodations. <u>Transit Taskforce</u> : Serves for one year and advises the Board of County Commissioners on funding options and transit issues. The taskforce is comprised of 19 members of the community representing large employers, health care, social services, higher education, and transportation and planning professionals.	Identify funding to continue construction 20-40 shelters annually and upgrade all stops to ADA compliance.
Transportation (DOT)	Update and implementation of LeeScape Plan, <u>Bicycle Pedestrian Advisory Committee</u> coordination, complete streets. By doing so, accessibility, comfort and safety will be enhanced. CSAC Working Group	Explore opportunities to address public involvement more comprehensively, e.g. from project inception to completion, targeting a wider variety of residents, etc. Developing design criteria and implementing context sensitive designm LDC/AC changes, and implementation of Complete Streets



Foster the preservation, construction & maintenance of an adequate supply of healthful, affordable, resource-efficient, & inclusive housing. Residential development should be available to all ages, abilities, incomes, & household sizes & be located in environmentally safe areas near public transportation, jobs, & critical goods & services.

HOUSING

PARTNERS	ACCOMPLISHMENTS	OPPORTUNITIES
County Lands	Contributor with Human Services in the Neighborhood Stabilization Program. County Lands finds/selects, negotiates, purchases homes and (after HS Rehabs) resells homes for affordable housing. Through experience and by having in-house Broker the funding for this program was stretched and put back into the program. TO-DATE 124 homes have been purchased by County Lands. 58 homes have been SOLD for affordable housing after rehab. 23 homes are listed and 15 homes are under contract for purchase. Approximately 30 additional homes will be identified for purchase.	

DCD – Planning	<p><u>Lee Plan Goal 4: Sustainable Development Design.</u> To pursue or maintain land development regulations which encourage creative site designs and mixed use developments. Using an overlay, locate appropriate areas for Mixed Use, Traditional Neighborhood Development, and Transit Oriented Development.</p> <p><u>Goal 5: Residential Land Uses.</u> To provide sufficient land in appropriate locations on the Future Land Use Map to accommodate the projected population of Lee County in the year 2030 in attractive and safe neighborhoods with a variety of price ranges and housing types.</p> <p>The Lee Plan provides guidance for where certain land use elements may occur within Lee County. By revising the land use elements to designate certain areas in the county to become more mixed-use, providing more live-work situations, the demographics will become balanced.</p> <p><u>SHIP (State Housing Initiatives Partnership)</u> – A state program that provides funds to local governments as an incentive to create partnerships what produce and preserve affordable homeownership and multifamily housing.</p> <p><u>New Horizon 2035:</u> Comprehensive Review of the Lee Plan through the year 2035. Executive Summary, Vision Framework, and Chapters 3 and 4 of this report provide the foundation for amendments to the Lee Plan that promote compact and complete communities that support housing.</p>	<p>Utilize traditional neighborhood design development practices and mixed-use neighborhoods to better integrate a variety of housing options into live, work, and play. The housing options ought to provide for a wide variety of population needs, incomes, and generational interests.</p> <p>Ensure future support for SHIP.</p>
Economic Development (EDO)	Respond to the business community housing needs through symposiums, task forces, and communication of the latest efforts to address workforce housing issues.	Affordable housing is not an issue in the short term due to excess inventory; this creates an impediment to some of the community planning initiatives as the market forces drive people to the cheap, vacant properties. Explore opportunities for Economic Development to promote live-work development by directing growth to mixed-use, redevelopment areas identified in future amendments to the Lee Plan through New Horizon 2035 .
Human Services	Working with County Lands, the Housing Services program acquires, rehabilitates and resells affordable homes to income-qualified buyers under the Neighborhood Stabilization Program . Multifamily projects are also included to facility affordable rental housing for individuals unable or unwilling to purchase home. The program also improves housing conditions for low to very low-income families, and stabilizes and preserves deteriorating neighborhoods by rehabilitating and stabilizing substandard dwelling units to extend the economic life of the dwelling units.	
Transportation (DOT)	Use of Transit Orientation Index as a review parameter for transit facilities as well as Complete Streets evaluation	
PUBLIC SPACE		
	<i>Invest in, program & optimally maintain diverse & interconnected public spaces that feature equitable, convenient, & comfortable access, encourage safe & healthy behaviors, minimize hazards, are culturally appropriate & attract & serve all populations.</i>	
PARTNERS	ACCOMPLISHMENTS	OPPORTUNITIES
Construction & Design (C&D)	The county provides art & public space components in building projects.	
DCD - ES	<u>LDC Chapter 33</u> Planning Community Regulations Section 113 for Estero encourages places of public interest / open space for the public in commercial developments. This section also recommends pathways, benches, fountains, tables with umbrellas, etc. in the public open space area.	Explore opportunities to require neighborhood parks for projects over a designated size community-side that are accessible for everybody.

DCD – Planning	<p><u>Lee Plan. Parks, Recreation and Open Space Element.</u> Provides distribution of facilities (parks), development design requirements for park areas, provide adequate community parks, regional parks, parking planning and design, and fuels environmental and historic programs for the community.</p> <p><u>New Horizon 2035</u> Comprehensive Review of the Lee Plan through the year 2035. Executive Summary, Vision Framework, and Chapters 3 and 4 of this report provide the foundation for amendments to the Lee Plan that promote compact and complete communities that support public space.</p>	<p>Review best practices and utilize best practices to update the Lee Plan as part of <u>New Horizon 2035</u>.</p> <p>Develop a form and character design component of the Lee Plan, which addresses need to increase opportunities for public spaces areas and supports the ideals of traditional neighborhood design.</p> <p>Target locations to implement the Compact Communities Code.</p>
DCD – Zoning	<p><u>Land Development Code (LDC) Chapter 32; LDC 34-411</u> - In addition to the design goals and principles set forth in Chapter 32, the property proposed for development must be of such size, configuration, and dimension as to adequately accommodate the proposed structures, all required open space, including private recreational facilities and parkland, bikeways, pedestrian ways, buffers, parking, access, on-site utilities, and reservations of environmentally sensitive land or water. Also, where a planned development is surrounded by existing development that is compatible and of an equivalent intensity of use, the design must integrate the two developments.</p>	<p>Target amendments that promote the development of sustainable public spaces.</p>
DOT	<p>DOT currently collaborates with the <u>Metropolitan Planning Organization</u>, Capital Improvement Project planning, and Planning Design & Engineering Studies. MPO makes long range recommendations, including <u>bicycle and pedestrian</u> connections, as to how projects are planned. Planning, Design & Engineering Studies along with Capital projects are the implementation of that direction.</p>	<p>Explore opportunities to address public involvement more comprehensively, e.g. from project inception to completion, targeting a wider variety of residents, etc.</p>
Human Services	<p><u>Neighborhood Building Program:</u> Facilitates projects which include sidewalks, play grounds, and community centers that utilize public spaces in the neighborhood and promote and encourage safe, healthy and culturally appropriate recreational and social behaviors.</p>	
Library	<p>The new Fort Myers Library is being designed with a strong public space component. There will be multiple meeting rooms and outdoor plaza areas for special/cultural events.</p>	<p>Explore opportunities to promote public space in retrofits/improvements and new facility design.</p>
Parks and Recreation (P&R)	<p>The <u>Lee County Greenways Master Plan</u> provides a framework for the implementation of a comprehensive greenway system for use by Lee County residents and visitors. The greenways offer regional links to adjacent counties to the north, south and to the east, thereby enhancing the statewide greenway system. The greenway trails serve as the major spines or routes thereby allowing smaller arterial linkages and area bicycle pedestrian projects to link to a major greenway system. This will establish an alternative transportation network by creating connections for people to move about safely throughout the County for recreation, enjoying the outdoors, shopping, and getting to school or work.</p>	
Transportation (DOT)		<p>Evaluate integration of stormwater management areas with a pocket park, shared streets, a Ciclovia type of event, implementation of an ADA transition plan</p>



Reduce vehicle miles traveled & associated greenhouse gas & criteria air pollutant emissions by enhancing the availability of, & access to, diverse transportation choices, including non-motorized modes & transit; create safe, affordable mobility & physical activity opportunities for all; & provide & optimally maintain infrastructure that efficiently & affordably moves people & goods locally & regionally.

PARTNERS	ACCOMPLISHMENTS	OPPORTUNITIES
Community Development (DCD) – Planning	<p><u>Lee Plan Goal 4: Sustainable Development Design.</u> To pursue or maintain land development regulations which encourage creative site designs and mixed use developments. Using an overlay, locate appropriate areas for Mixed Use, Traditional Neighborhood Development, and Transit Oriented Development.</p> <p><u>Goal 43: Mass Transit Service.</u> In an effort to minimize the number of automobile trips on Lee County roads, the county will provide high quality public transit service to residents and visitors in and between the concentrated population centers of Lee County, and ensure that this service is integrated with other modes of transportation.</p> <p><u>Goal 44: Transit Development Plan.</u> To continue the development of a Transit Development Plan for the county.</p> <p><u>New Horizon 2035:</u> Comprehensive Review of the Lee Plan through the year 2035. Executive Summary, Vision Framework, and Chapters 3 and 4 of this report provide the foundation for amendments to the Lee Plan that promote compact and complete communities that support reductions in vehicle miles travelled.</p> <p>Transportation map series (3C Transit Network, 3D Bike-Ped, and 22 Trails and Greenways)</p>	<p>Review best practices and utilize best practices to update the Lee Plan as part of <u>New Horizon 2035</u>.</p> <p>Expand the connectivity components of the Lee Plan in order to better address issues related to multi-modal connections, mobility, and alternative modes of transportation. Issues to be addressed include mass transit, pedestrian accessibility, bike-ability, and integration of land uses, services, and resources. Outcome should guide the county towards utilizing connectivity as a means to develop live-work-play opportunities throughout the county.</p> <p>Target locations to implement the Compact Communities Code.</p> <p>Better integration of maps (3C Transit Network, 3D Bike-Ped, and 22 Trails and Greenways) with the highway network maps, reorganization of the Transportation Element of the Lee Plan with a balanced multimodal approach as recommended in the EAR</p>
County Lands	Division of County Lands staff coordinates with Transit (Lee Tran) in obtaining bus shelter locations/easements, and provides ongoing assistance to Lee DOT with right of way (ROW) opportunities, which include acquisition of land and easements for roads, bike lanes and sidewalks.	Evaluate use of County property for transit purposes
DCD – Zoning	<u>Land Development Code (LDC) 34-411; LDC 34-373</u> - All planned developments must have access to existing or proposed roads (1) in accordance with the Lee Plan traffic circulation element or the official trafficways map of the County and (2) that have either sufficient existing capacity or the potential for expanded capacity to accommodate both the traffic generated by the proposed land use and that traffic expected from the background. The development must also be designed to facilitate the use of the transit system.	Explore opportunities to reevaluate capacity/concurrency issues to promote Complete Streets and reduce vehicle miles travelled for private and public projects. Also, in conjunction with <u>LDC Ch 32</u> , compact urban forms to help reduce vehicle miles traveled and subsequent benefits.
Economic Development (EDO)	EDO has assembled task forces to study transportation issues and provide recommendations relating to transportation. These task forces tended to look at financing rather than the specific types of transportation. The most recent taskforce that dealt with transportation was the Transportation and Workforce Taskforce. Taskforces are formed for a year and usually not renewed. They are put together in response to issues raised by the membership of the Horizon Council.	Explore opportunities to measure the demand for multi-modal transportation from an economic development perspective.
Facilities	Lee County has a carpool program/Park & Ride. This represents a collaborative effort between Facilities, Libraries, and Transit and provides incentives for staff to reduce single occupancy vehicle to and from work.	Expand park and ride options and marketing of program to increase participation

Fleet	<p>Fleet Management tracks and reports miles traveled (used) and fuel consumed for County departments.</p> <p>Use of alternative fuel vehicles</p>	<p>Explore opportunities to reduce vehicle miles traveled in county fleet.</p> <p>Use Lee Tran for more than employee commuter transportation, use in place of using County vehicles when conducting County business</p>
Parks and Recreation (P&R)	<p>The Lee County Greenways Master Plan provides a framework for the implementation of a comprehensive greenway system for use by Lee County residents and visitors. The greenways offer regional links to adjacent counties to the north, south and to the east, thereby enhancing the statewide greenway system. The greenway trails serve as the major spines or routes thereby allowing smaller arterial linkages and area bicycle pedestrian projects to link to a major greenway system. This will establish an alternative transportation network by creating connections for people to move about safely throughout the County for recreation, enjoying the outdoors, shopping, and getting to school or work.</p>	<p>Implementation of County Parks and Trails and Greenways with connections to bicycle and pedestrian facilities</p>
Transit	<p>Operates 18 bus routes covering 400 road miles in Lee County in accordance with the Transit Development Plan.</p> <p>Increased ridership</p>	<p>Continue Transit Development Plan improvements.</p> <p>Explore feasibility of bus rapid transit and routes given population changes in the community.</p> <p>Explore providing free transit services to County employees.</p>
Transportation (DOT)	<p>DOT currently collaborates with the Metropolitan Planning Organization, conducts Capital Improvement Project planning, and conducts Planning Design and Engineering Studies to promote excellence in design and address multi-modal transportation.</p> <p>Coordinates the Bicycle Pedestrian Advisory Committee.</p> <p>Coordinates the Roadway Landscape Advisory Committee. The Roadway Landscape program reduces carbon emissions and the heat island by collocating vegetation with the roads.</p> <p>DOT provides leadership in implementing the county's Complete Streets resolution. Complete Streets' goal is to retrofit and design streets that are safe, comfortable and accessible to users of all ages and abilities -- pedestrians, bicyclists and transit riders as well as motorists.</p> <p>Signal Re-timing Project evaluated existing traffic operation and made needed adjustments to best optimize the flow of traffic. Comparing actual "before" and "after" travel time runs, the overall cumulative annual project benefits in improved travel time, reduced fuel consumption, and reductions in automobile emissions (carbon-monoxide and nitrogen oxides) from retiming the 50 intersections are:</p> <ul style="list-style-type: none"> • 23% reduction in travel delay = \$15,300,000 annually (value of time saved) • 5600 gallons of fuel saved per day = \$2,000,000 per year • 19% less emissions = \$124,000 annual benefit • Total estimated annual value of savings is over \$17,000,000 <p>Retrofitting bicycle and pedestrian facilities along existing roadways, review road surfacing and CIP projects for Complete Streets needs, countywide decrease in AADT and VMT</p>	<p>Address multi-modal transportation more comprehensively through New Horizon 2035 Lee Plan, Land Development Code, and Administrative Code revisions.</p> <p>Explore opportunities to address public involvement more comprehensively, e.g. from project inception to completion, targeting a wider variety of residents, etc.</p>

DCD -ES	<p>c. The natural waterway buffer must be designed to incorporate the natural resources maintenance easement required under section 10-328(a). Vegetation removal within the buffer is limited to</p> <ol style="list-style-type: none"> 1. Routine removal of exotics and downed vegetative debris; 2. Limited removal to allow access of vehicles for maintenance of the waterway; 3. Removal permitted as a condition of dock approval; and <p>Prior to removal of native vegetation, approval must be obtained from ES staff.</p>	
DCD – Planning	<p>Lee Plan addresses development out to 2030. Interdepartmental coordination teams ensure planning exercises take into account the big picture, promoting a balanced approach to future growth.</p>	<p>Utilize vision established in the plan assessment to update the Lee Plan. Rework the Vision Framework Element according to the New Horizon 2035 vision, vision guidelines and principles, as well as promote sustainable development.</p>
DCD – Zoning	<p>Zoning regulations dictate uses to avoid promote compatibility.</p> <p>LDC 34-411; 34-373 All developments must demonstrate consistency with all Goals, Objectives and Policies of the Lee Plan and must be located so as to minimize the negative effects of the resulting land uses on surrounding properties and the public interest generally, and must be of such size, configuration and dimension as to adequately accommodate the proposed structures, all required open space, including private recreational facilities and parkland, bikeways, pedestrian ways, buffers, parking, access, on-site utilities, including wet or dry runoff retention, and reservations of environmentally sensitive land or water.</p>	<p>Evaluate opportunities to promote better connectivity between projects.</p> <p>Revise LDC in accordance with the New Horizon 2035 revisions to better demonstrate/illustrate Lee County’s vision, e.g. form-based code. Focus less on uses and more of sense of place to promote economic development, mixed-use, walkability without compromising aesthetics and community character.</p>
Economic Development (EDO)	<p>The Horizon Council serves as a connection to the business community on planning issues. The Horizon Council forms annual task forces to address issues as the need arises. Some recent taskforces include, Transportation Funding, Business Issues (to better coordinate between permitting, zoning, and the business community), and Housing.</p>	<p>Assist in growth recruiting, diversifying, & maintaining businesses, and promote alternative transportation redevelopment and infill.</p> <p>Review best practices and utilize best practices to update the Lee Plan as part of New Horizon 2035.</p>
Public Safety	<p>Established Shelter and Evacuation Mitigation Requirements for new developments in unincorporated Lee County</p> <p>LDC Section 2-485 Requirements for Emergency Preparedness Plans for new developments and shelter mitigation requirements (Lee Plan Goals 105, 106 and 109)</p>	
Transit	<p>Transit Development Plan is formulated every five years with annual updates. It covers a 10-year planning horizon and incorporates significant input from users, stakeholders and community leaders. It forecasts future demand for transit services based on community growth patterns, economic indicators and other demographic data.</p>	<p>Ensure transit needs are considered by Identifying opportunities to collaborate with other community planning initiatives.</p>

Transportation (DOT)	<p>DOT currently collaborates with the Metropolitan Planning Organization and conducts Capital Improvement Project planning.</p> <p>DOT provides leadership in implementing the county's Complete Streets resolution, which includes leading the Complete Streets interdepartmental performance team. Part of the implementation of Complete Streets required the development of a revised planning and budgeting process. The framework for this revised process has been drafted and will be implemented to promote a holistic approach to transportation planning that will ensure all perspectives and design issues are considered when making transportation decisions.</p>	<p>Address multi-modal transportation more comprehensively through New Horizon 2035: Lee Plan, Land Development Code, and Administrative Code revisions.</p>
Utilities (LCU)	<p>The Integrated Water Resource Master Plan includes a long range projection (2030) of growth and related demands for potable water, wastewater flows, and demands for reclaimed water within the future service areas as shown in the Lee County Comprehensive Plan. Recommendations related to sources of supply and necessary capital improvements related to providing the infrastructure to meet the projected demands are provided in the plan.</p>	
Visitor and Convention Bureau (VCB)	<p>Ordinance 10-31 Local non-profit attractions receiving Tourist Development Tax marketing funding are required to participate in ongoing new product development education with the VCB</p>	<p>Explore opportunities to offer workshops by Sustainable Tourism Laboratory www.sustainabletourism.com</p>



EXCELLENCE IN DESIGN

Encourage the siting & design of public & private projects to minimize environmental impact, maximize financial efficiency, optimize social equity & benefits, & improve public health.

PARTNERS	ACCOMPLISHMENTS	OPPORTUNITIES
Community Development (DCD)	<p>Through the enforcement of the Land Development Code (LDC) in general, staff ensure that private development utilize the code to lessen the impacts of development.</p> <p>Compact Communities Code Pilot Projects:</p> <p>North Fort Myers Town Center: The development of a Form-Based Code for the North Fort Myers Town Center, which is to be located along US 41 between the Caloosahatchee River and Pondella Road. The goal of this project is develop a future development plan that emphasizes the center's function, form, and scale rather than use, building setbacks, and more standard conventional zoning approaches. In doing so, the community seeks to establish an interconnected center that provides diverse opportunities for residents, business people, and visitors.</p>	<p>Encourage redevelopment and infill in designated urban areas.</p> <p>Review best practices and utilize best practices to update the Lee Plan as part of New Horizon 2035. Establish a form and character design component of the Lee Plan to promote a distinct sense of the place for the county. Establish a Health Element in the Lee Plan to promote healthy communities, including access to healthy and, where ever possible, locally grown food.</p> <p>Target additional locations to implement the Compact Communities Code.</p>

Community Development (DCD) (cont.)	Lehigh Acres Community Centers: Utilize the Lee County Compact Communities Code to promote mixed-use centers in the central part of the Lehigh Acres Community located in the area where Lee Boulevard, Homestead Road, and Joel Boulevard connect. As a result of this effort, Lehigh Acres will utilize form based development standards to spur development of a mixed-use downtown center, community center, and neighborhood center and in doing so help spur the development of economic, cultural, and social areas within this predominantly residential community.	Encourage redevelopment and infill in designated urban areas. Review best practices and utilize best practices to update the Lee Plan as part of New Horizon 2035 . Establish a form and character design component of the Lee Plan to promote a distinct sense of the place for the county. Establish a Health Element in the Lee Plan to promote healthy communities, including access to healthy and, where ever possible, locally grown food. Target additional locations to implement the Compact Communities Code.
Construction and Design (C&D)	Use of mulch, (recycled material) in pathways and planting beds.	Explore opportunities to: use of recycled rubber (crushed tires) as a playground material base, recycled plastic in pathways (boardwalks). Explore reimbursement of monetary credits with certain vendors to recycle used carpet thus reducing the costs of our new carpet purchases. Quantify diverted materials in construction demolition and waste from landfills.
County Lands	Representing the impact of a public-private partnership, the contracted project construction manager for the new Emergency Operations Center Facility suggested the County pursue purchase of privately held City of Fort Myers road impact fee credits. The Division of County Lands staff obtained approval to negotiate with private developers holding these credits, which allowed the County to realize a savings of approximately \$65,000 to the overall project by purchasing impact fee credits in this manner.	There are two other County projects (downtown Library and Lee Tran Facility) that will require City of Fort Myers impact fee credits which will also be sought in this same manner. Privately held impact fee credits will continue to be sought in this manner for future County projects.
Human Services	Housing Services : Rehabilitation and development projects consider environmental impact, maximize financial efficiency and optimize social equity. Neighborhood staff also works with low-income neighborhoods on Community Development Block Grant (CDBG) infrastructure projects.	
Natural Resources	The Surface Water CIP Program is responsible for preparing stormwater master planning on a county-wide basis. This includes mapping and cataloging of drainage facilities, preparation of simulation models for selected rainfall events, monitoring water quality at selected locations, and monitoring rainfall and flood stage recordings. The Density Reduction Ground Water Recharge Comprehensive Hydrological Study conducted by Lee County Natural Resources was conducted to inform Lee County zoning and development policy to ensure adequate groundwater recharge for sustainable public use and prevent contamination of drinking water resources.	DNR could update surface water master plans, watershed basin delineations, and inventory/geo-locate our entire stormwater infrastructure to enhance future planning activities. Develop policies incentivizing Low-Impact Development, increasing native Florida stormwater retention areas, and implementing "Green" technologies for development and industry. Lee County's NPDES program identifies emerging technologies for pollution reduction as well as public education concepts that can guide how the County can implement Green technologies and improve on current statewide and local design criteria.
Public Safety	Shelter Mitigation Requirements for new developments and use of mitigation fees to identify and upgrade potential shelter facilities (LDC 2-485 and Lee Plan Goal 109)	

Public Works

Lee Plan, POLICY 2.11.5, instructs the County to maintain a Master Mitigation Plan as a Future Land Use Element. Maintain a Master Mitigation Plan that will identify and map and update, through a science based process, those lands with the environmental science based opportunities for mitigation, remediation, or preservation. Promote such areas for such uses through County programs. (Added by Ordinance No. 07-16)

Lee County Master Mitigation Plan (Environmental Quality Investment and Growth Mitigation Strategic Plan) Public Works Program was initiated to mitigate Lee County Government projects with environmental impacts in-basin and in-jurisdiction, on Conservation 2020 lands. The Program was initiated for Public Works projects and has been spearheaded by the Department Of Transportation. The following projects have been accomplished or are initiated to date:

- Island Park Regional Mitigation Area (Estero Marsh Preserve)- North Phase

The entire northern 80 acres of this preserve was restored and enhanced as mitigation for environmental impacts associated with the Three Oaks Parkway South Extension. Mitigation activities included exotic removal, wet prairie and filter marsh creation including re-establishment of historic flow ways. Total Lee County cost for the mitigation credits generated was \$1 million. Estimated total cost for equivalent mitigation credits at a Lee County based Mitigation Bank is \$4 million.

- B. Island Park Regional Mitigation Area (Estero Marsh Preserve)- South Phase

Permits were obtained from the SFWMD and USACOE confirming that enhancement and restoration of the 160 acre preserve would yield 80 wetland mitigation credits (in-basin and in-jurisdiction) in advance of proposed Lee County Public Works projects. The mitigation project is complete and meeting environmental success criteria. Total costs for the project were under \$2 million. Estimated total cost for equivalent mitigation credits at a Lee County based Mitigation Bank is \$8 million. The enhancements on this preserve have been recognized by the US Fish and Wildlife Service as appropriate mitigation for the federally endangered wood stork. Environmental impacts associated with the following Lee County Government Projects have been (or will be) mitigated by the Island Park Regional Mitigation Area:

- Colonial Blvd. Widening
- Daniels Rd. Fire Station / LCDOT partnership
- Ortiz Avenue Widening
- Six Mile Cypress Widening

Solid Waste	The Waste to Energy Facility is sited and permitted under the Clean Air Act (CAA) and meets extensive regulations for air emissions. The current bond rating remains stable (AAA).	
Transportation (DOT)	<p>DOT currently collaborates with the Metropolitan Planning Organization, conducts Capital Improvement Project planning, and conducts Planning Design and Engineering Studies to promote excellence in design.</p> <p>DOT provides leadership in implementing the county's Complete Streets resolution, which includes leading the Complete Streets interdepartmental performance team. Part of the implementation Complete Streets required the development of a revised planning and budgeting process. The framework for this revised process has been drafted and will be implemented to promote a holistic approach to transportation planning that will ensure all perspectives and design issues are considered when making transportation decisions.</p>	<p>Explore opportunities to address public involvement more comprehensively, e.g. from project inception to completion, targeting a wider variety of residents, etc.</p> <p>Review best practices and utilize best practices to update the Lee Plan as part of New Horizon 2035.</p> <p>Identify street segments with multiple planned County projects and planning the improvements to be completed simultaneously.</p>
VCB	Ordinance 10-31: Tourist Development Tax revenues fund capital improvement projects through the Beach & Shoreline program (26.4%) and the Stadium debt fund (20%)	

INTERCONNECTED LAND USE



Encourage diverse, accessible, & proximate land uses to promote active living & access to vital services including employment, education, & healthy food.

PARTNERS	ACCOMPLISHMENTS	OPPORTUNITIES
Community Development (DCD) – Planning	<p>Compact Communities Code Pilot Projects:</p> <p>North Fort Myers Town Center: The development of a Form-Based Code for the North Fort Myers Town Center, which is to be located along US 41 between the Caloosahatchee River and Pondella Road. The goal of this project is develop a future development plan that emphasizes the center's function, form, and scale rather than use, building setbacks, and more standard conventional zoning approaches. In doing so, the community seeks to establish an interconnected center that provides diverse opportunities for residents, business people, and visitors.</p> <p>Lehigh Acres Community Centers: Utilize the Lee County Compact Communities Code to promote mixed-use centers in the central part of the Lehigh Acres Community located in the area where Lee Boulevard, Homestead Road, and Joel Boulevard connect. As a result of this effort, Lehigh Acres will utilize form based development standards to spur development of a mixed-use downtown center, community center, and neighborhood center and in doing so help spur the development of economic, cultural, and social areas within this predominantly residential community.</p>	<p>Establish a form and character design component of the Lee Plan, which addresses need to improve connectivity and supports the ideals of traditional neighborhood design. Establish a Health Element in the Lee Plan to promote healthy communities, including access to healthy and, where ever possible, locally grown food. Develop goals, objectives, and policies in the Vision, Future Land Use, Communities, Housing, Transportation, Community Facilities and Services, and Parks, Recreation, and Open Space Elements which support the desired development form and design character of the county.</p> <p>Target additional locations to implement the Compact Communities Code.</p> <p>Implementation of Complete Streets and prioritization of diverse, accessible, and proximate land uses.</p>
DCD - Zoning	<p>LDC Chapter 32 – The Compact Communities code was adopted to promote compact walkable neighborhoods and mixed-use centers within the Density Reduction/Groundwater Resource future land use area of Lee County.</p> <p>Allowing live-work where appropriate.</p>	Implement the Compact Communities Code beyond current designated areas

Human Services	Neighborhood Building Program : Establishes projects that include sidewalks, play grounds, and bike trails in existing neighborhoods	Expand projects to include community gardens.
Parks and Recreation (P&R)	<p>The Lee County Greenways Master Plan provides a framework for the implementation of a comprehensive greenway system for use by Lee County residents and visitors. The greenways offer regional links to adjacent counties to the north, south and to the east, thereby enhancing the statewide greenway system. The</p> <p>greenway trails serve as the major spines or routes thereby allowing smaller arterial linkages and area bicycle pedestrian projects to link to a major greenway system. This will establish an alternative transportation network by creating connections for people to move about safely throughout the County for recreation, enjoying the outdoors, shopping, and getting to school or work.</p>	

COMPACT & COMPLETE COMMUNITIES



Create compact communities with a range of services that allow for amenities & transportation options; afford equitable access to the ingredients of what makes for an economically & socially viable neighborhood; reduce the community's carbon footprint.

PARTNERS	ACCOMPLISHMENTS	OPPORTUNITIES
DCD – Planning	<p>Lee Plan Goal 1: Future Land Use Map. To maintain and enforce a Future Land Use Map showing the proposed distribution, location, and extent of future land uses by type, density, and intensity in order to protect natural and man-made resources, provide essential services in a cost-effective manner, and discourage urban sprawl.</p> <p>Goal 2: Growth Management. To provide for an economically feasible plan that coordinates the location and timing of new development with the provision of infrastructure by government agencies, private utilities, and other sources.</p> <p>Goal 4: Sustainable Development Design. To pursue or maintain land development regulations which encourage creative site designs and mixed use developments. Using an overlay, locate appropriate areas for Mixed Use, Traditional Neighborhood Development, and Transit Oriented Development.</p> <p>Goal 5: Residential Land Use. To provide sufficient land in appropriate locations on the Future Land Use Map to accommodate the projected population of Lee County in the year 2030 in attractive and safe neighborhoods with a variety of price ranges and housing types.</p> <p>Goal 6: Commercial Land Use. To permit orderly and well-planned commercial development at appropriate locations within the county.</p>	<p>Review best practices and utilize best practices to update the Lee Plan as part of New Horizon 2035.</p> <p>Establish a form and character design component of the Lee Plan. Target locations to implement the Compact Communities Code.</p> <p>Strengthen and incentivize redevelopment and infill in urban areas.</p>

Objectives 21.2: *Commercial Land Uses.* Existing and future county regulations, land use interpretations, policies, on-going approvals, and administrative actions should be undertaken in an effort to promote the goal of commercial redevelopment along SR 80 and increased commercial opportunities to service the needs of the Caloosahatchee Shores Community and surrounding areas. County regulations should attempt to ensure that commercial areas maintain a unified and pleasing aesthetic/visual quality in landscaping, architecture, lighting and signage. Commercial land uses must be designed to be compatible with and further the historic character and identity of existing rural Old Florida and Florida Vernacular styles of architecture and the historic identity of Olga.

Objective 23.2: *Commercial Land Uses.* Existing and future county regulations, land use interpretations, policies, zoning approvals, and administrative actions must recognize the unique conditions and preferences of the Palm Beach Boulevard Community to ensure that commercial areas maintain a unified and pleasing aesthetic/visual quality in landscaping, architecture, lighting and signage and provide for employment opportunities. Uses that are not compatible with adjacent uses or those that have significant adverse impacts on natural resources will be discouraged.

Objective 27.6: *Transportation.* All road improvements within the Page Park Community considered by the County will address the Community's goal to maintain its small town character and give preference to alternatives that allow existing roads to function at their current capacity.

Objective 28.2: *Land Use: Centers and Corridors.* Identify and pursue Town Center overlay districts, road corridor overlay districts and redevelopment areas.

Objective 31.3: *Commercial Land Uses.* Ensure that new development areas create a unified and pleasing aesthetic/visual quality through landscaping, architecture, lighting, and signage, while providing additional employment opportunities, and eliminating uses that are not compatible with the adjacent uses. Existing and future county regulations, land use interpretations, policies, zoning approval, and administrative actions should be undertaken in an effort to promote the goal of redevelopment for the areas with increases mixed use opportunities to service the needs of the community and surrounding areas. Commercial land uses must be designed to be compatible Old Florida or other Florida Vernacular styles of architecture and the historic identity of the area.

Objectives 31.6: *Coordination of Mass Transit.* The developer(s) will coordinate with Lee County to ensure consistency with the Transit Development Plan (TDP).

Objective 32.5: *Neighborhood Mixed Use Activity Center.* Are areas of sufficient size and location that will help to contribute the uses needed to support large portions of the Lehigh Acres Planning Community including: residential; public and private education; live-work; retail; office; medical; entertainment; light industrial; commercial/public parking; parks; and , other civic uses. These locations are identified on Map 1.

DCD – Planning (cont.)	<p><u>Objectives 32.6: Local Mixed Use Activity Centers.</u> Are areas located within existing and emerging residential neighborhoods that are intended to support the local daily commercial needs of the neighborhood. Local Activity Centers are envisioned as floating designations that may be applied for as part of a rezoning.</p> <p><u>New Horizon 2035:</u> Comprehensive Review of the Lee Plan through the year 2035. Executive Summary, Vision Framework, and Chapters 3 and 4 of this report provide the foundation for amendments to the Lee Plan that promote compact and complete communities.</p>	
DCD – Zoning	<p><u>LDC Chapter 32 Compact Communities</u> - The intent of chapter 32 is to create compact walkable neighborhoods and mixed-use centers using form-based code techniques. Design goals and principles include: (1) A compact physical form with identifiable centers and edges, with opportunities for shopping and workplaces near residential neighborhoods; (2) A highly interconnected street network, to disperse traffic and provide convenient routes for pedestrians and bicyclists; (3) High-quality public spaces, with building façades having windows and doors facing tree-lined streets, plazas, squares, or parks; (4) A variety of building types, street types, open spaces, and land uses providing for people of all ages and every form of mobility; and (5) Resiliency and sustainability, allowing adaptation over time to changing economic conditions and broader transportation options. Planned developments are also encouraged to create subunits, neighborhoods or internal communities which promote pedestrian activity and community interaction. Also, a fundamental principle of planned development design is the creative use of the open space requirement to produce an architecturally integrated human environment and to not create or increase hazards to persons or property whether on or off the site.</p>	Revise the <u>LDC</u> to promote sustainable communities, complete streets, and compact development.
Department of Health (DOH)/Fit-Friendly SWFL	Fit-Friendly SWFL Strategic Plan provides for opportunities for the health community to advocate for community design that promotes active transportation.	Expand opportunities to advocate for active transportation options throughout Lee County and the region.
Economic Development (EDO)		Assist in growth recruiting, diversifying, & maintaining businesses, promote alternative transportation redevelopment and infill.
Sustainability	<p><u>Lee County Greenhouse Gas Emissions Inventory CY 2007:</u> The inventory was completed in 2010 to establish the baseline emissions data for the Lee Count, FL, as well as Lee County as an organization</p>	<p>Explore carbon costs/return on investment for future projects.</p> <p>Explore goals related to off-setting the county’s emissions through program efficiencies, sustainable construction and design, new technology, and renewable energy credits.</p> <p>Explore opportunities to promote public education around emissions and reduce emissions communitywide.</p> <p>Establish collaborative relationships with municipalities within Lee County to promote emissions reductions.</p> <p>Set Greenhouse Gas (GHG) emission reduction targets.</p>
Transportation (DOT)	Retrofit of sidewalks and traffic calming devices in older platted neighborhoods, specifically those identified as the highest priority by the community.	Development of street design standards to improve access to transit, enhance walkability, and promote bicycle usage.



Create human-scale built environments that provide comfort, safety, accessibility & are pleasing to all human inhabitants.

PARTNERS	ACCOMPLISHMENTS	OPPORTUNITIES
DCD – Environmental Sciences	<p>Land Development Code (LDC) Chapter 33 The Estero Planning Community encourages sidewalk linkages between projects.</p>	<p>More effort must be made to encourage walk-able communities within already established neighborhoods so that residents may walk to commercial establishments.</p>
DCD – Planning	<p>Lee Plan Goal 4: Sustainable Development Design. To pursue or maintain land development regulations which encourage creative site designs and mixed use developments. Using an overlay, locate appropriate areas for Mixed Use, Traditional Neighborhood Development, and Transit Oriented Development.</p> <p>Objectives 32.6: Local Mixed Use Activity Centers. Are areas located within existing and emerging residential neighborhoods that are intended to support the local daily commercial needs of the neighborhood. Local Activity Centers are envisioned as floating designations that may be applied for as part of a rezoning.</p> <p>Objective 32.9: Transportation, Parking, and Traffic Circulation. Lee County will work to improve transportation, parking, and circulation within the Lehigh Acres Planning Community.</p> <p>Objective 39.1: Development Impacts. The county will maintain and enforce development regulations to ensure that impacts of development approvals occur concurrently with adequate roads, and to achieve maximum safety, efficiency, and cost effectiveness.</p> <p>Objective 40.1: Protection of Roadway Capacity. The county will protect the capacity and operational ability of county-maintained roadways, through the enforcement of access control, connection separation and other methods.</p> <p>Objective 40.4: Other Modes of Transportation. When conducting all transportation planning and engineering studies, consider the needs and opportunities to allow and encourage the use of all modes of transportation.</p> <p>New Horizon 2035: Comprehensive Review of the Lee Plan through the year 2035. Executive Summary, Vision Framework, and Chapters 3 and 4 of this report provide the foundation for amendments to the Lee Plan that promote compact and complete communities, promoting human scale.</p>	<p>Review best practices and utilize best practices to update the Lee Plan as part of New Horizon 2035.</p> <p>Establish a form and character design component of the Lee Plan which is focused on the development of distinct urban, suburban, and rural places. The element should provide a framework for how the county can ensure the different places in the county to promote connectivity, housing options, public spaces, and mixture of uses.</p> <p>Target locations to implement the Compact Communities Code.</p>
DCD – Zoning	<p>Recommend projects that are compatible with surrounding areas.</p> <p>LDC Chapter 32; LDC 34-411 - The intent of chapter 32 is to create compact walkable neighborhoods and mixed-use centers using form-based code techniques. Design goals and principles include: (1) A compact physical form with identifiable centers and edges, with opportunities for shopping and workplaces near residential neighborhoods; (2) A highly interconnected street network, to disperse traffic and provide convenient routes for pedestrians and bicyclists; (3) High-quality public spaces, with building façades having windows and doors facing tree-lined streets, plazas, squares, or parks; (4) A variety of building types, street types, open spaces, and land uses providing for people of all ages and every form of mobility; and (5) Resiliency and</p>	<p>Revise the LDC to promote sustainable communities, complete streets, and compact development.</p> <p>Create LDC for communities to address specific needs related to comfort, safety, accessibility, and aesthetics.</p>

DCD – Zoning (cont.)	sustainability, allowing adaptation over time to changing economic conditions and broader transportation options. Planned developments are also encouraged to create subunits, neighborhoods or internal communities which promote pedestrian activity and community interaction. Also, a fundamental principle of planned development design is the creative use of the open space requirement to produce an architecturally integrated human environment and to not create or increase hazards to persons or property whether on or off the site.	
Human Services	<u>Neighborhood Building Program</u> : Facilitates projects that include sidewalks which increases and improves safety and accessibility for neighborhood residents.	
Parks and Recreation (P&R)	The <u>Lee County Greenways Master Plan</u> provides a framework for the implementation of a comprehensive greenway system for use by Lee County residents and visitors. The greenways offer regional links to adjacent counties to the north, south and to the east, thereby enhancing the statewide greenway system. The greenway trails serve as the major spines or routes thereby allowing smaller arterial linkages and area bicycle pedestrian projects to link to a major greenway system. This will establish an alternative transportation network by creating connections for people to move about safely throughout the County for recreation, enjoying the outdoors, shopping, and getting to school or work.	
Transit	Improvements are being made to transit infrastructure, specifically the construction of passenger waiting shelters that are fully accessible with solar lighting, bike racks and wheelchair accommodations. <u>Transit Taskforce</u> : Serves for one year and advises the Board of County Commissioners on funding options and transit issues. The taskforce is comprised of 19 members of the community representing large employers, health care, social services, higher education, and transportation and planning professionals.	Identify funding to continue construction 20-40 shelters annually and upgrade all stops to ADA compliance.
Transportation (DOT)	Update and implementation of LeeScape Plan, <u>Bicycle Pedestrian Advisory Committee</u> coordination, complete streets. By doing so, accessibility, comfort and safety will be enhanced. CSAC Working Group	Explore opportunities to address public involvement more comprehensively, e.g. from project inception to completion, targeting a wider variety of residents, etc. Developing design criteria and implementing context sensitive designm LDC/AC changes, and implementation of Complete Streets



Foster the preservation, construction & maintenance of an adequate supply of healthful, affordable, resource-efficient, & inclusive housing. Residential development should be available to all ages, abilities, incomes, & household sizes & be located in environmentally safe areas near public transportation, jobs, & critical goods & services.

HOUSING

PARTNERS	ACCOMPLISHMENTS	OPPORTUNITIES
County Lands	Contributor with Human Services in the Neighborhood Stabilization Program. County Lands finds/selects, negotiates, purchases homes and (after HS Rehabs) resells homes for affordable housing. Through experience and by having in-house Broker the funding for this program was stretched and put back into the program. TO-DATE 124 homes have been purchased by County Lands. 58 homes have been SOLD for affordable housing after rehab. 23 homes are listed and 15 homes are under contract for purchase. Approximately 30 additional homes will be identified for purchase.	

DCD – Planning	<p><u>Lee Plan Goal 4: Sustainable Development Design.</u> To pursue or maintain land development regulations which encourage creative site designs and mixed use developments. Using an overlay, locate appropriate areas for Mixed Use, Traditional Neighborhood Development, and Transit Oriented Development.</p> <p><u>Goal 5: Residential Land Uses.</u> To provide sufficient land in appropriate locations on the Future Land Use Map to accommodate the projected population of Lee County in the year 2030 in attractive and safe neighborhoods with a variety of price ranges and housing types.</p> <p>The Lee Plan provides guidance for where certain land use elements may occur within Lee County. By revising the land use elements to designate certain areas in the county to become more mixed-use, providing more live-work situations, the demographics will become balanced.</p> <p><u>SHIP (State Housing Initiatives Partnership)</u> – A state program that provides funds to local governments as an incentive to create partnerships what produce and preserve affordable homeownership and multifamily housing.</p> <p><u>New Horizon 2035:</u> Comprehensive Review of the Lee Plan through the year 2035. Executive Summary, Vision Framework, and Chapters 3 and 4 of this report provide the foundation for amendments to the Lee Plan that promote compact and complete communities that support housing.</p>	<p>Utilize traditional neighborhood design development practices and mixed-use neighborhoods to better integrate a variety of housing options into live, work, and play. The housing options ought to provide for a wide variety of population needs, incomes, and generational interests.</p> <p>Ensure future support for SHIP.</p>
Economic Development (EDO)	Respond to the business community housing needs through symposiums, task forces, and communication of the latest efforts to address workforce housing issues.	Affordable housing is not an issue in the short term due to excess inventory; this creates an impediment to some of the community planning initiatives as the market forces drive people to the cheap, vacant properties. Explore opportunities for Economic Development to promote live-work development by directing growth to mixed-use, redevelopment areas identified in future amendments to the Lee Plan through <u>New Horizon 2035</u> .
Human Services	Working with County Lands, the <u>Housing Services</u> program acquires, rehabilitates and resells affordable homes to income-qualified buyers under the <u>Neighborhood Stabilization Program</u> . Multifamily projects are also included to facility affordable rental housing for individuals unable or unwilling to purchase home. The program also improves housing conditions for low to very low-income families, and stabilizes and preserves deteriorating neighborhoods by rehabilitating and stabilizing substandard dwelling units to extend the economic life of the dwelling units.	
Transportation (DOT)	Use of Transit Orientation Index as a review parameter for transit facilities as well as Complete Streets evaluation	
PUBLIC SPACE		
	<p><i>Invest in, program & optimally maintain diverse & interconnected public spaces that feature equitable, convenient, & comfortable access, encourage safe & healthy behaviors, minimize hazards, are culturally appropriate & attract & serve all populations.</i></p>	
PARTNERS	ACCOMPLISHMENTS	OPPORTUNITIES
Construction & Design (C&D)	The county provides art & public space components in building projects.	
DCD - ES	<u>LDC Chapter 33</u> Planning Community Regulations Section 113 for Estero encourages places of public interest / open space for the public in commercial developments. This section also recommends pathways, benches, fountains, tables with umbrellas, etc. in the public open space area.	Explore opportunities to require neighborhood parks for projects over a designated size community-side that are accessible for everybody.

DCD – Planning	<p>Lee Plan. <i>Parks, Recreation and Open Space Element</i>. Provides distribution of facilities (parks), development design requirements for park areas, provide adequate community parks, regional parks, parking planning and design, and fuels environmental and historic programs for the community.</p> <p>New Horizon 2035 Comprehensive Review of the Lee Plan through the year 2035. Executive Summary, Vision Framework, and Chapters 3 and 4 of this report provide the foundation for amendments to the Lee Plan that promote compact and complete communities that support public space.</p>	<p>Review best practices and utilize best practices to update the Lee Plan as part of New Horizon 2035.</p> <p>Develop a form and character design component of the Lee Plan, which addresses need to increase opportunities for public spaces areas and supports the ideals of traditional neighborhood design.</p> <p>Target locations to implement the Compact Communities Code.</p>
DCD – Zoning	<p>Land Development Code (LDC) Chapter 32; LDC 34-411 - In addition to the design goals and principles set forth in Chapter 32, the property proposed for development must be of such size, configuration, and dimension as to adequately accommodate the proposed structures, all required open space, including private recreational facilities and parkland, bikeways, pedestrian ways, buffers, parking, access, on-site utilities, and reservations of environmentally sensitive land or water. Also, where a planned development is surrounded by existing development that is compatible and of an equivalent intensity of use, the design must integrate the two developments.</p>	<p>Target amendments that promote the development of sustainable public spaces.</p>
DOT	<p>DOT currently collaborates with the Metropolitan Planning Organization, Capital Improvement Project planning, and Planning Design & Engineering Studies. MPO makes long range recommendations, including bicycle and pedestrian connections, as to how projects are planned. Planning, Design & Engineering Studies along with Capital projects are the implementation of that direction.</p>	<p>Explore opportunities to address public involvement more comprehensively, e.g. from project inception to completion, targeting a wider variety of residents, etc.</p>
Human Services	<p>Neighborhood Building Program: Facilitates projects which include sidewalks, play grounds, and community centers that utilize public spaces in the neighborhood and promote and encourage safe, healthy and culturally appropriate recreational and social behaviors.</p>	
Library	<p>The new Fort Myers Library is being designed with a strong public space component. There will be multiple meeting rooms and outdoor plaza areas for special/cultural events.</p>	<p>Explore opportunities to promote public space in retrofits/improvements and new facility design.</p>
Parks and Recreation (P&R)	<p>The Lee County Greenways Master Plan provides a framework for the implementation of a comprehensive greenway system for use by Lee County residents and visitors. The greenways offer regional links to adjacent counties to the north, south and to the east, thereby enhancing the statewide greenway system. The greenway trails serve as the major spines or routes thereby allowing smaller arterial linkages and area bicycle pedestrian projects to link to a major greenway system. This will establish an alternative transportation network by creating connections for people to move about safely throughout the County for recreation, enjoying the outdoors, shopping, and getting to school or work.</p>	
Transportation (DOT)		<p>Evaluate integration of stormwater management areas with a pocket park, shared streets, a Ciclovia type of event, implementation of an ADA transition plan</p>



Reduce vehicle miles traveled & associated greenhouse gas & criteria air pollutant emissions by enhancing the availability of, & access to, diverse transportation choices, including non-motorized modes & transit; create safe, affordable mobility & physical activity opportunities for all; & provide & optimally maintain infrastructure that efficiently & affordably moves people & goods locally & regionally.

PARTNERS	ACCOMPLISHMENTS	OPPORTUNITIES
<p>Community Development (DCD) – Planning</p>	<p><u>Lee Plan Goal 4: Sustainable Development Design.</u> To pursue or maintain land development regulations which encourage creative site designs and mixed use developments. Using an overlay, locate appropriate areas for Mixed Use, Traditional Neighborhood Development, and Transit Oriented Development.</p> <p><u>Goal 43: Mass Transit Service.</u> In an effort to minimize the number of automobile trips on Lee County roads, the county will provide high quality public transit service to residents and visitors in and between the concentrated population centers of Lee County, and ensure that this service is integrated with other modes of transportation.</p> <p><u>Goal 44: Transit Development Plan.</u> To continue the development of a Transit Development Plan for the county.</p> <p><u>New Horizon 2035:</u> Comprehensive Review of the Lee Plan through the year 2035. Executive Summary, Vision Framework, and Chapters 3 and 4 of this report provide the foundation for amendments to the Lee Plan that promote compact and complete communities that support reductions in vehicle miles travelled.</p> <p>Transportation map series (3C Transit Network, 3D Bike-Ped, and 22 Trails and Greenways)</p>	<p>Review best practices and utilize best practices to update the Lee Plan as part of <u>New Horizon 2035</u>.</p> <p>Expand the connectivity components of the Lee Plan in order to better address issues related to multi-modal connections, mobility, and alternative modes of transportation. Issues to be addressed include mass transit, pedestrian accessibility, bike-ability, and integration of land uses, services, and resources. Outcome should guide the county towards utilizing connectivity as a means to develop live-work-play opportunities throughout the county.</p> <p>Target locations to implement the Compact Communities Code.</p> <p>Better integration of maps (3C Transit Network, 3D Bike-Ped, and 22 Trails and Greenways) with the highway network maps, reorganization of the Transportation Element of the Lee Plan with a balanced multimodal approach as recommended in the EAR</p>
<p>County Lands</p>	<p>Division of County Lands staff coordinates with Transit (Lee Tran) in obtaining bus shelter locations/easements, and provides ongoing assistance to Lee DOT with right of way (ROW) opportunities, which include acquisition of land and easements for roads, bike lanes and sidewalks.</p>	<p>Evaluate use of County property for transit purposes</p>
<p>DCD – Zoning</p>	<p><u>Land Development Code (LDC) 34-411; LDC 34-373</u> - All planned developments must have access to existing or proposed roads (1) in accordance with the Lee Plan traffic circulation element or the official trafficways map of the County and (2) that have either sufficient existing capacity or the potential for expanded capacity to accommodate both the traffic generated by the proposed land use and that traffic expected from the background. The development must also be designed to facilitate the use of the transit system.</p>	<p>Explore opportunities to reevaluate capacity/concurrency issues to promote Complete Streets and reduce vehicle miles travelled for private and public projects. Also, in conjunction with <u>LDC Ch 32</u>, compact urban forms to help reduce vehicle miles traveled and subsequent benefits.</p>
<p>Economic Development (EDO)</p>	<p>EDO has assembled task forces to study transportation issues and provide recommendations relating to transportation. These task forces tended to look at financing rather than the specific types of transportation. The most recent taskforce that dealt with transportation was the Transportation and Workforce Taskforce. Taskforces are formed for a year and usually not renewed. They are put together in response to issues raised by the membership of the Horizon Council.</p>	<p>Explore opportunities to measure the demand for multi-modal transportation from an economic development perspective.</p>
<p>Facilities</p>	<p>Lee County has a carpool program/Park & Ride. This represents a collaborative effort between Facilities, Libraries, and Transit and provides incentives for staff to reduce single occupancy vehicle to and from work.</p>	<p>Expand park and ride options and marketing of program to increase participation</p>

Fleet	<p>Fleet Management tracks and reports miles traveled (used) and fuel consumed for County departments.</p> <p>Use of alternative fuel vehicles</p>	<p>Explore opportunities to reduce vehicle miles traveled in county fleet.</p> <p>Use Lee Tran for more than employee commuter transportation, use in place of using County vehicles when conducting County business</p>
Parks and Recreation (P&R)	<p>The Lee County Greenways Master Plan provides a framework for the implementation of a comprehensive greenway system for use by Lee County residents and visitors. The greenways offer regional links to adjacent counties to the north, south and to the east, thereby enhancing the statewide greenway system. The greenway trails serve as the major spines or routes thereby allowing smaller arterial linkages and area bicycle pedestrian projects to link to a major greenway system. This will establish an alternative transportation network by creating connections for people to move about safely throughout the County for recreation, enjoying the outdoors, shopping, and getting to school or work.</p>	<p>Implementation of County Parks and Trails and Greenways with connections to bicycle and pedestrian facilities</p>
Transit	<p>Operates 18 bus routes covering 400 road miles in Lee County in accordance with the Transit Development Plan.</p> <p>Increased ridership</p>	<p>Continue Transit Development Plan improvements.</p> <p>Explore feasibility of bus rapid transit and routes given population changes in the community.</p> <p>Explore providing free transit services to County employees.</p>
Transportation (DOT)	<p>DOT currently collaborates with the Metropolitan Planning Organization, conducts Capital Improvement Project planning, and conducts Planning Design and Engineering Studies to promote excellence in design and address multi-modal transportation.</p> <p>Coordinates the Bicycle Pedestrian Advisory Committee.</p> <p>Coordinates the Roadway Landscape Advisory Committee. The Roadway Landscape program reduces carbon emissions and the heat island by collocating vegetation with the roads.</p> <p>DOT provides leadership in implementing the county's Complete Streets resolution. Complete Streets' goal is to retrofit and design streets that are safe, comfortable and accessible to users of all ages and abilities -- pedestrians, bicyclists and transit riders as well as motorists.</p> <p>Signal Re-timing Project evaluated existing traffic operation and made needed adjustments to best optimize the flow of traffic. Comparing actual "before" and "after" travel time runs, the overall cumulative annual project benefits in improved travel time, reduced fuel consumption, and reductions in automobile emissions (carbon-monoxide and nitrogen oxides) from retiming the 50 intersections are:</p> <ul style="list-style-type: none"> • 23% reduction in travel delay = \$15,300,000 annually (value of time saved) • 5600 gallons of fuel saved per day = \$2,000,000 per year • 19% less emissions = \$124,000 annual benefit • Total estimated annual value of savings is over \$17,000,000 <p>Retrofitting bicycle and pedestrian facilities along existing roadways, review road surfacing and CIP projects for Complete Streets needs, countywide decrease in AADT and VMT</p>	<p>Address multi-modal transportation more comprehensively through New Horizon 2035 Lee Plan, Land Development Code, and Administrative Code revisions.</p> <p>Explore opportunities to address public involvement more comprehensively, e.g. from project inception to completion, targeting a wider variety of residents, etc.</p>

Visitor and Convention Bureau (VCB)	Department vehicle is a hybrid; VCB offsets the impact of staff operations including travel by participating in the conservation Fund's Go Zero program	Carbon offset program for visitors travelling into Lee county
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Shape the settlement pattern & protect critical community resources by acquiring, conserving, & managing important landscapes in perpetuity.

PARTNERS	ACCOMPLISHMENTS	OPPORTUNITIES
Community Development (DCD) - ES	<p><u>LDC 10-415</u> Require protection and incorporation of natural features into development design.</p> <p><u>LDC 10-415</u> Requires a certain percentage of indigenous open space for projects 10 acres or greater or those proposing 2 acres or more of impervious area.</p> <p><u>LDC 10-415</u> Requires small projects that are less than 10 acres or 2 acres of impervious to create a certain percentage of open space depending on the type of use.</p>	<p>Connect up natural areas between developments.</p> <p>Encourage development in urban areas.</p>
Conservation 20/20	<p><u>Ord. 05-17</u> Land Acquisition and Stewardship Program: <u>Conservation 20/20</u></p> <p><u>Conservation 20/20 Land Acquisition and Stewardship Advisory Committee</u> is a citizen advisory committee that meets every month to review C20/20 nominations, acquisitions, land stewardship plans & activities and general management.</p> <p>There are <u>two subcommittees</u> of the Conservation Land Acquisition and Stewardship Advisory Committee (CLASAC). Both the Criteria and Ranking Subcommittee and the Management Subcommittee are made up of a smaller number of members from the CLASAC.</p> <p>Before land is selected for negotiation a two phase environmental review is conducted. Established by Resolutions outlined below:</p> <p><u>97-06-82</u> – Original Land Program Parameters</p> <p><u>06-12-02</u> – Leave a Legacy Program created to entice land owners to submit heritage properties and give possible naming rights for preserves</p> <p><u>07-01-32</u> added Eco-archeological</p> <p><u>07-10-12</u> adding Master Mitigation Plan to review criteria</p>	
DCD – Planning	<p><u>Lee Plan Conservation and Coastal Management Element. Goal 107: Resource Protection.</u> To manage the county's wetland and upland ecosystems so as to maintain and enhance native habitats, floral and faunal species diversity, water quality, and natural surface water characteristics.</p> <p><u>Goal 114: Wetlands.</u> To maintain and enforce a regulatory program for development in wetlands that is cost-effective, complements federal and state permitting processes, and protects that fragile ecological characteristics of wetland systems.</p>	<p>Strategically execute the county's land preservation efforts to support the urban, suburban, and rural land use context envisioned through the <u>New Horizon 2035</u> effort.</p>

DCD – Planning (cont.)	Objective 22.4: Lee County will preserve, protect, and, where possible, enhance the physical integrity, village character, ecological values, and natural beauty of Boca Grande and Gasparilla Island, focusing upon the diverse and healthy native vegetation, the clear offshore waters, and the varied and abundant native marine and wildlife resources in a manner compatible with the Gasparilla Island Conservation District Act, the promotion and preservation of the historic Boca Grande village as a thriving community, and preservation of Gasparilla Island’s historic heritage.	
DCD – Zoning	LDC 34-411 – Planned developments must coordinate the use of open space with the preservation or conservation of environmentally sensitive land and waters or archaeological sites.	
Parks and Recreation (P&R)	The Lee County Greenways Master Plan provides a framework for the implementation of a comprehensive greenway system for use by Lee County residents and visitors. The greenways offer regional links to adjacent counties to the north, south and to the east, thereby enhancing the statewide greenway system. The greenway trails serve as the major spines or routes thereby allowing smaller arterial linkages and area bicycle pedestrian projects to link to a major greenway system. This will establish an alternative transportation network by creating connections for people to move about safely throughout the County for recreation, enjoying the outdoors, shopping, and getting to school or work.	

HISTORIC PRESERVATION & CULTURAL HERITAGE



Promote the preservation & reuse of historic resources, including buildings, structures, sites, neighborhood districts & cultural landscapes to assist in the retention of local, regional national history & heritage, reinforcement of community character, & conservation of material resources.

PARTNERS	ACCOMPLISHMENTS	OPPORTUNITIES
Community Development (DCD) – Planning	Lee Plan. Historic Preservation Element. Identifies and evaluates historic resources in Lee County, gives recognition and provides historic registration for historic resources, and provides a Historic Preservation Board as an outlet for the public to engage in historic preservation. Historic Preservation Board – reviews applications for developing land with historical structures. Architectural and uses are reviewed to ensure consistency with the Lee Plan.	Evaluate needs related to preservation of both historic buildings and landscapes. Continue support for the Historic Preservation.
Facilities	Facilities Services maintains several historical Lee County-owned properties. Examples are The Old Court House, Olga Community Center, Boca Grande Community Center, and a couple of Time Capsules. Facilities will also be maintaining the historic homes that were moved to Estero Park once they are restored.	
Library	The library system maintains an extensive collection of genealogy and local history materials. Throughout the year numerous workshops are held in partnership with local genealogy groups to educate and assist with the identification and preservation of family history.	
Visitor and Convention Bureau (VCB)	Ordinance 10-31: Tourist tax revenues fund attraction marketing programs for area cultural/historic/art venues and assist in the ongoing promotion of them (Edison Ford Winter Estates, Randall Research Center, Sidney & Berne Davis Art Center, Art of the Olympians and other area attractions).	



Ensure that planning guidelines, zoning codes, building codes, & health codes consider community & site context, improve ecological integrity, are based on life cycle costing, foster social equity, & reward innovation.

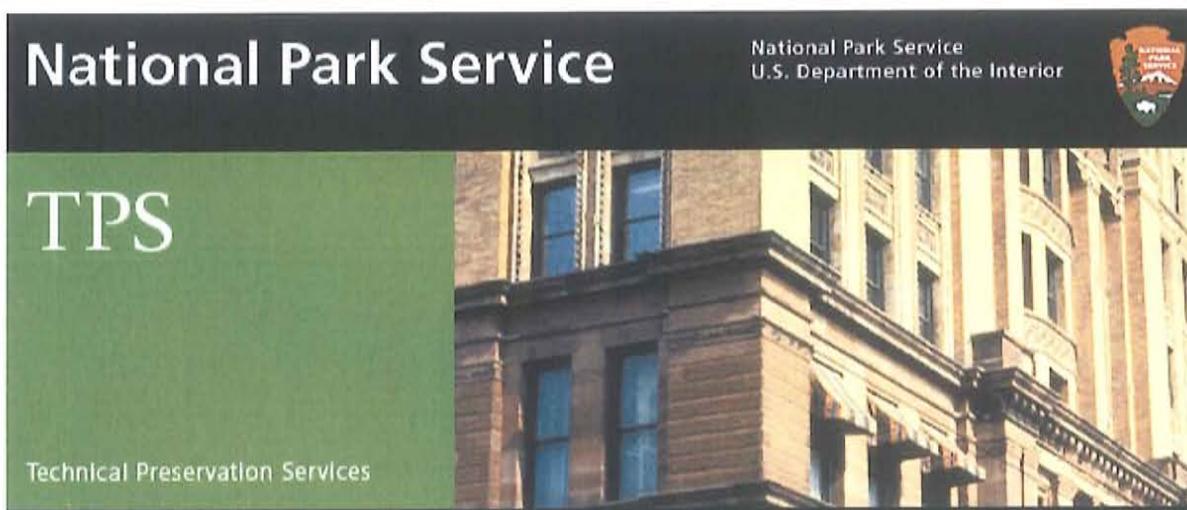
PARTNERS	ACCOMPLISHMENTS	OPPORTUNITIES
Community Development (DCD) – Planning	<p><u>New Horizon 2035</u>: Comprehensive Review of the Lee Plan through the year 2035. Executive Summary, Vision Framework, and Chapters 3 and 4 of this report provide the foundation for amendments to the Lee Plan that promote compact and complete communities that support amendments to the current codes and ordinances.</p> <p>An interdepartmental coordination team of county staff is being employed to help maintain code, policy, goal consistency between divisions when rewriting / forming new codes, policies, and goals in accordance with New Horizon: 2035.</p>	<p>Utilize the <u>New Horizon 2035</u> process to evaluate the county’s development, planning, budgeting, and service delivery practices in order to ensure that they are coordinated and focused on achieving the county’s vision.</p> <p>Explore opportunities to award innovation and look at life cycle costs in planning activities.</p>
DCD – Zoning	<p><u>LDC</u> Chapter 34 - Establish zoning districts and regulate the location and use of buildings, signs, and other structures, water and land for agriculture, trade, industry and residence, by regulating and limiting or determining the height, bulk and access to light and air of buildings and structures, the area of yards and other open spaces and the density of use.</p>	<p>Revisions to the zoning codes must be done so that they are consistent with the changes in the Lee Plan, especially as they pertain to sustainability.</p>
Economic Development (EDO)	<p>There is currently a Business Issues Task Force under the Horizon Council. The taskforce makes recommendations to the departments or BOCC that are often adopted. Usually these focus on making the process more easily understood by small businesses that do not have experience dealing with zoning, permitting, or inspections on a regular basis. This helps to foster social equity by insuring that a greater number of small or family run businesses do not face unnecessary barriers to innovation or entrepreneurship.</p>	<p>Actively participate in Lee Plan and Land Development Code amendment process (New Horizon 2035).</p>
Public Safety	<p><u>Ord. 07-26</u>. Telecommunications Network Ordinance addresses the uninterrupted operation of Lee County’s public safety, law enforcement, and other emergency-related and county operational telecommunications networks by requiring that persons or entities constructing or erecting structures in Lee County, do so in a manner which does not interfere with Lee County’s telecommunications networks. Lee County telecommunications networks are essential to the health, safety, and welfare of Lee County by providing communications for law enforcement activities, emergency management, fire suppression, carrying on the business of government, and for providing communications in time of hurricanes and other disasters.</p>	
Transportation (DOT)		<p>Implement context sensitive design practices</p>



Provide regular, meaningful, & equitable opportunities for citizens to shape the future of their communities.

PARTNERS	ACCOMPLISHMENTS	OPPORTUNITIES
Community Development (DCD) – Planning	<p><u>Community Planning</u> program established to protect and direct development in the county’s various communities.</p> <p><u>New Horizon 2035</u>: Planning Process</p>	<p>Utilize the county’s community planning efforts to educate county residents and other stakeholders about the county’s development practices and procedures.</p>

Community Development (DCD) – Planning (cont.)	Administrative Code 13.7 and 13.6 . Communities may apply for a community plan to establish Lee Plan Goals and Land Development Codes to better shape their community culturally, historically, and naturally. The communities schedule their own meetings to discuss plans for a community plan and meet with county staff that helps facilitate those plans.	
Conservation 20/20	Conservation 20/20 Land Acquisition and Stewardship Advisory Committee is a citizen advisory committee that meets every month to review C20/20 nominations, acquisitions, land stewardship plans & activities and general management. This committee’s meetings are open to the public.	
DCD – Zoning	LDC Chapter 33 : Guidelines and provisions a planning community believes is necessary to achieve goals, objectives and policies of the Lee Plan applicable to each recognized individual planning community located within unincorporated Lee County. Through Chapter 33, communities may apply for a community plan to establish Lee Plan Goals and Land Development Codes to better shape their community culturally, historically, and naturally. The communities schedule their own meetings to discuss plans for a community plan and meet with county staff that helps facilitate those plans.	Enhance regulations to better fit individual planning community goals.
Human Services	Neighborhood Building Program : Facilitates Neighborhood Associations to promote better neighborhoods and community group action. The Associations develop Revitalization Strategies focusing on safety, housing, transportation, capital and infrastructure improvements, social, educational and recreational activities and provide input in how federal funds should be utilized in their neighborhoods.	Neighborhood Building can do public and consumer education activities regarding sustainable communities within Neighborhoods.
Public Resources	Over 100 Advisory Committees exist to supply citizen opportunities to participate. The committees are listed on the County website for those who want to see vacancies	Promote opportunities for advisory committee involvement. Continue efforts to expand public participation and transparency, including use of websites/social media.
Transit	Transit Development Plan , written every 5 years with annual updates, gathers significant input from the community regarding attitudes toward the current transit system and needs for the future.	Explore opportunities to seat a permanent advisory committee for transit.
Transportation (DOT)	DOT currently collaborates with the Metropolitan Planning Organization , conducts Capital Improvement Project planning, and conducts Planning Design and Engineering Studies to promote excellence in design and address multi-modal transportation. There are opportunities provided for public involvement in current systems.	Explore opportunities to address public involvement more comprehensively, e.g. from project inception to completion, targeting a wider variety of residents, etc.



WE HAVE A NEW WEBSITE

Technical Preservation Services, National Park Service, is pleased to announce the launch of our [expanded and redesigned website](#). In the new site, you will find the [Secretary of the Interior's Standards and Guidelines](#); information about the [Historic Preservation Tax Incentives](#); all of [our publications](#), including the [Preservation Briefs](#) and [Preservation Tech Notes](#); guidance on [meeting the Standards](#) in rehabilitation projects; information on the [Historic Surplus Property Program](#) and the [Historic Preservation Internship Training Program](#); [online training](#); and much more.

The new site features expanded information on [Sustainability and Historic Preservation](#), including the recently-published [Secretary of the Interior's Standards for Rehabilitation & Illustrated Guidelines on Sustainability for Rehabilitating Historic Buildings](#). Also included are links to [research and studies](#) on energy efficiency and historic buildings and to [sustainability resources](#) for home owners, historic districts and communities and Federal agencies.

Case studies highlighting [successful tax incentives projects](#) and [projects that combined historic rehabilitation and green building practices](#) rotate on the home page and in several sections of the site. The [Site Map](#) helps users navigate the site.

[Technical Preservation Services](#) develops historic preservation policy and guidance on preserving and rehabilitating historic buildings, administers the Federal Historic Preservation Tax Incentives Program for rehabilitating historic buildings, and sets the Secretary of the Interior's Standards for the Treatment of Historic Properties.

Contact Technical Preservation Services

Technical Preservation Services
National Park Service

1201 "Eye" Street, NW, 6th Floor
Washington, DC 20005

Phone (202) 513-7270
Email NPS_TPS@nps.gov

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NPS Digest

NPS Gateway for Partners, Friends and Alumni

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New Sustainability And Historic Preservation Guidelines Out

[\[Printer-friendly text version\]](#)

In celebration of Earth Day, the National Park Service is pleased to announce publication of *The Secretary of the Interior's Standards for Rehabilitation & Illustrated Guidelines on Sustainability for Rehabilitating Historic Buildings*.

Developed by Technical Preservation Services, Cultural Resources, Washington Office, these are the first official guidelines on how to make changes to improve energy efficiency and preserve the character of historic buildings. The guidelines are an important addition to current discussions about sustainability and achieving greater energy efficiency, which have focused primarily on new buildings to date. The guidelines are available online in PDF format at www.nps.gov/history/hps/tps and will be available for purchase from the Government Printing Office.

The *Guidelines on Sustainability* stress the inherent sustainability of historic buildings and offer specific guidance on "recommended" rehabilitation treatments and "not recommended" treatments, which could negatively impact a building's historic character. Illustrations of both types of treatments are included. The guidelines are designed to assist building owners in planning rehabilitation projects that will meet the standards for rehabilitation. They are the latest in a series of guidelines produced by Technical Preservation Services on historic features such as masonry and roofs, which are available at www.nps.gov/history/hps/tps/tax/rhb/index.htm.

Initially developed by the Secretary of the Interior to determine the appropriateness of proposed work supported by the Historic Preservation Fund grant-in-aid program, the *Standards for Rehabilitation* are now widely used at the federal, state, and local level. They are used to determine if a rehabilitation project qualifies as a certified rehabilitation for Federal historic preservation tax incentives and have been adopted by historic district and planning commissions across the country.

The standards promote the long-term preservation of historic materials and features. They pertain to historic buildings of all materials, construction types, sizes and occupancy and include the exterior and the interior of the buildings. They also encompass the building's site and environment, including landscape features, as well as attached adjacent or related new construction.

The *Standards for Rehabilitation* are one of the four *Secretary of the Interior's Standards for the Treatment of Historic Properties*, which also include preservation, restoration, and reconstruction. These four sets of standards, developed by Technical Preservation Services in the 1980s, fulfilled the Secretary of the Interior's responsibility to advise federal agencies on the preservation of historic properties listed in or eligible for listing in the National Register of Historic Places.

[More Information...](#)

Contact Information

Name: Anne Grimmer
Phone Number: 202-354-2028
Email: anne_grimmer@nps.gov

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Technical Preservation Services

National Park Service
U.S. Department of the Interior[Home](#) > Sustainability

Sustainability

Energy Efficiency in Historic Buildings

With increasing pressures to save energy and “go green”, it can be difficult to determine the appropriate and effective treatments for a historic property.

New Technology and Historic Properties

From solar panels to green roofs, modern devices are increasingly popular ways to reduce the environmental impact of our existing built environment.

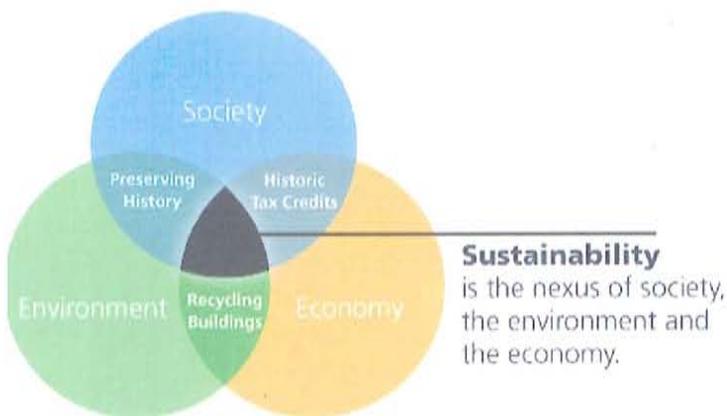
Sustainable Preservation in Practice

Benefit from the experience of others. Check out [success stories](#), learn about [sustainability studies and research](#), and discover available [resources](#).

New Guidelines

TPS recently published [Illustrated Guidelines on Sustainability for Rehabilitating Historic Buildings](#)

See how the [National Park Service is responding to climate change](#) in our National Parks.



Historic preservation is inherently a sustainable practice.

A commonly quoted phrase, “the greenest building is the one that’s already built,” succinctly expresses the relationship between preservation and sustainability. The repair and retrofitting of existing and historic buildings is considered by many to be the ultimate recycling project, and focusing on historic buildings has added benefits for the larger community.

Traditional materials are generally durable, the continued maintenance of historic buildings and features relies on local craftsmen rather than replacement parts, and these structures generally make up the heart of our towns and cities. For decades, preservation programs like the Historic Preservation Tax Incentives have demonstrated that whole communities can be revitalized by rehabilitating individual buildings.

The National Park Service recognizes that climate change is real, and efforts to reduce our energy consumption on a national scale are vital. According to the U.S. Energy Information Administration, buildings are the largest consumers of energy in the nation.

In recognition of the role the built environment plays in energy use, Technical Preservation Services develops guidance and technical information about how historic properties can incorporate sustainable practices to reduce energy consumption, while maintaining those characteristics that make historic properties significant.



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THE SECRETARY
OF THE INTERIOR'S
STANDARDS FOR
REHABILITATION &

ILLUSTRATED
GUIDELINES ON
SUSTAINABILITY
FOR
REHABILITATING
HISTORIC
BUILDINGS



U.S. Department of the Interior
National Park Service
Technical Preservation Services

THE SECRETARY OF THE INTERIOR'S STANDARDS FOR REHABILITATION &

ILLUSTRATED GUIDELINES ON SUSTAINABILITY FOR REHABILITATING HISTORIC BUILDINGS

Anne E. Grimmer with Jo Ellen Hensley | Liz Petrella | Audrey T. Tepper

U.S. Department of the Interior
National Park Service
Technical Preservation Services
Washington, D.C.

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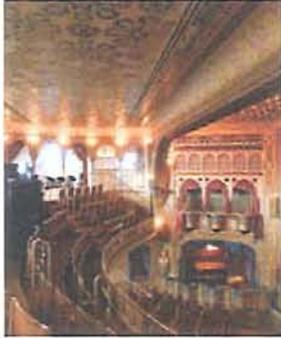
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Acknowledgements

The Secretary of the Interior's Standards for Rehabilitation & Illustrated Guidelines for Rehabilitating Historic Buildings was produced by Anne E. Grimmer and Kay D. Weeks, first published in 1992 and reprinted in 1997. The *Illustrated Guidelines on Sustainability for Rehabilitating Historic Buildings*, which are presented in the same format, replace the chapter on "Energy Conservation" in the 1992 publication. They have been developed with the guidance and support of numerous public agencies, professional organizations and individuals.

All photographs and drawings included here not individually credited have been selected from National Park Service files.



Foreword

The *Illustrated Guidelines on Sustainability for Rehabilitating Historic Buildings* replaces the chapter on “Energy Conservation” in the *Illustrated Guidelines for Rehabilitating Historic Buildings* published in 1992. (This same guidance is presented in the chapter entitled “Energy Retrofitting” in the unillustrated *Guidelines for Rehabilitating Historic Buildings*.) The illustrated version of the *Guidelines for Rehabilitating Historic Buildings* was designed to further enhance overall understanding and interpretation of basic preservation principles. *The Illustrated Guidelines on Sustainability* begin with an overview focusing on the fact that historic buildings are themselves often inherently sustainable and that this should be used to advantage in any proposal to upgrade them. These guidelines offer specific guidance on how to make historic buildings more sustainable in a manner that will preserve their historic character and that will meet *The Secretary of the Interior’s Standards for Rehabilitation*. The written guidance is illustrated with examples of appropriate or “recommended” treatments and some that are “not recommended” or could negatively impact the building’s historic character. The National Park Service Branch of Technical Preservation Services has developed these illustrated guidelines in accordance with its directive to provide information concerning professional methods and techniques to ensure the preservation and rehabilitation of the historic properties that are an important part of the nation’s heritage.

THE SECRETARY OF THE INTERIOR'S STANDARDS FOR REHABILITATION

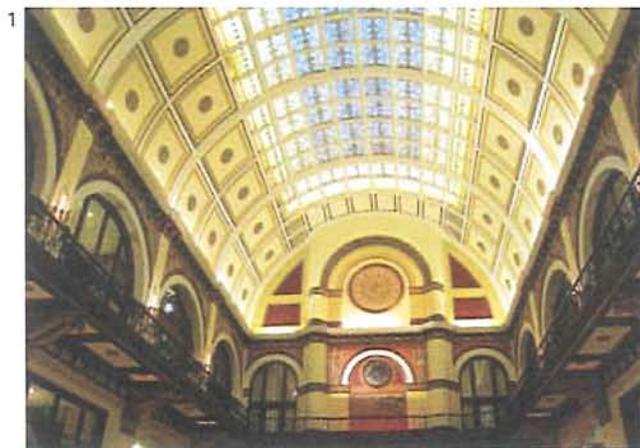
Introduction to the Standards

The Secretary of the Interior is responsible for establishing standards for all programs under Departmental authority and for advising federal agencies on the preservation of historic properties listed in or eligible for listing in the National Register of Historic Places. In partial fulfillment of this responsibility *The Secretary of the Interior's Standards for the Treatment of Historic Properties* have been developed to guide work undertaken on historic properties; there are separate standards for preservation, rehabilitation, restoration and reconstruction. *The Standards for Rehabilitation* (codified in 36 CFR 67) comprise that section of the overall treatment standards and address the most prevalent treatment. "Rehabilitation" is defined as the act or process of making possible a compatible use for a property through repair, alterations, and additions while preserving those portions or features which convey its historical, cultural, or architectural values."

Initially developed by the Secretary of the Interior to determine the appropriateness of proposed project work on registered properties supported by the Historic Preservation Fund grant-in-aid program, the Standards have been widely used

over the years—particularly to determine if a rehabilitation project qualifies as a Certified Rehabilitation for Federal Historic Preservation Tax Incentives. In addition, the Standards have guided federal agencies in carrying out their responsibilities for properties in federal ownership or control; and state and local officials in reviewing both federal and non-federal rehabilitation proposals. They have also been adopted by historic district and planning commissions across the country.

The intent of the Standards is to assist in the long-term preservation of historic materials and features. The Standards pertain to historic buildings of all materials, construction types, sizes and occupancy and include the exterior and the interior of the buildings. They also encompass the building's site and environment, including landscape features, as well as attached, adjacent or related new construction. To be certified for federal tax purposes, a rehabilitation project must be determined by the Secretary of the Interior to be consistent with the historic character of the structure(s) and, where applicable, the district in which it is located.



[1] Stained glass skylight provides natural light in a historic train station.



[2-3] Clerestory windows provide natural light in a historic industrial building: Before and after rehabilitation.



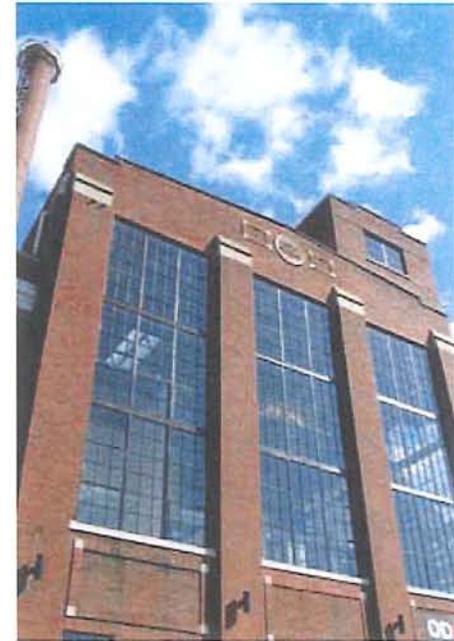
[4] Covered walkways and horizontal sun screens are distinctive and sustainable features in some mid-century modern office buildings.

As stated in the definition, the treatment “rehabilitation” assumes that at least some repair or alteration of the historic building will be needed in order to provide for an efficient contemporary use; however, these repairs and alterations must not damage or destroy materials, features or finishes that are important in defining the building’s historic character. For example, certain treatments—if improperly applied—may cause or accelerate physical deterioration of the historic building. This can include using improper repointing or exterior masonry cleaning techniques, or introducing insulation that may damage historic fabric. Any of these treatments will likely result in a project that does not meet the Standards. Similarly, exterior additions that duplicate the form, material and detailing of the historic structure to the extent that they compromise its historic character also will fail to meet the Standards.

The Secretary of the Interior's Standards for Rehabilitation

The Standards (Department of the Interior regulations 36 CFR 67) pertain to all historic properties listed in or eligible for listing in the National Register of Historic Places.

- 1) A property shall be used for its intended historic purpose or be placed in a new use that requires minimal change to the defining characteristics of the building and its site and environment.
- 2) The historic character of a property shall be retained and preserved. The removal of historic materials or alteration of features and spaces that characterize a property shall be avoided.
- 3) Each property shall be recognized as a physical record of its time, place, and use. Changes that create a false sense of historical development, such as adding conjectural features or architectural elements from other buildings, shall not be undertaken.
- 4) Most properties change over time; those changes that have acquired historic significance in their own right shall be retained and preserved.
- 5) Distinctive features, finishes, and construction techniques or examples of craftsmanship that characterize a historic property shall be preserved.
- 6) Deteriorated historic features shall be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature shall match the old in design, color, texture, and other visual qualities and, where possible, materials. Replacement of missing features shall be substantiated by documentary, physical, or pictorial evidence.



5



6

[5-6] Large windows and a roof monitor provide natural illumination in a historic industrial building.



7

[7-9] Porches and canvas awnings provide shade and keep interiors cool in historic residential and commercial buildings.



9



8

- 7) Chemical or physical treatments, such as sandblasting, that cause damage to historic materials shall not be used. The surface cleaning of structures, if appropriate, shall be undertaken using the gentlest means possible.
- 8) Significant archeological resources affected by a project shall be protected and preserved. If such resources must be disturbed, mitigation measures shall be undertaken.

- 9) New additions, exterior alterations, or related new construction shall not destroy historic materials that characterize the property. The new work shall be differentiated from the old and shall be compatible with the massing, size, scale, and architectural features to protect the historic integrity of the property and its environment.
- 10) New additions and adjacent or related new construction shall be undertaken in such a manner that if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired.



11

[11] A vestibule helps retain interior conditioned air in the living space in this historic row house.



10

[10] Wood shutters provide natural light when open and keep interiors cool when closed in historic residential buildings.



12

[12-14] Roof monitors provide natural light in historic industrial buildings



13



14

GUIDELINES FOR REHABILITATING HISTORIC BUILDINGS

Introduction to the Guidelines

The *Guidelines for Rehabilitating Historic Buildings* were initially developed in 1977 to help property owners, developers and federal managers apply *The Secretary of the Interior's Standards for Rehabilitation* during the project planning stage by providing general design and technical recommendations. Unlike the Standards, the Guidelines are not codified as program requirements.

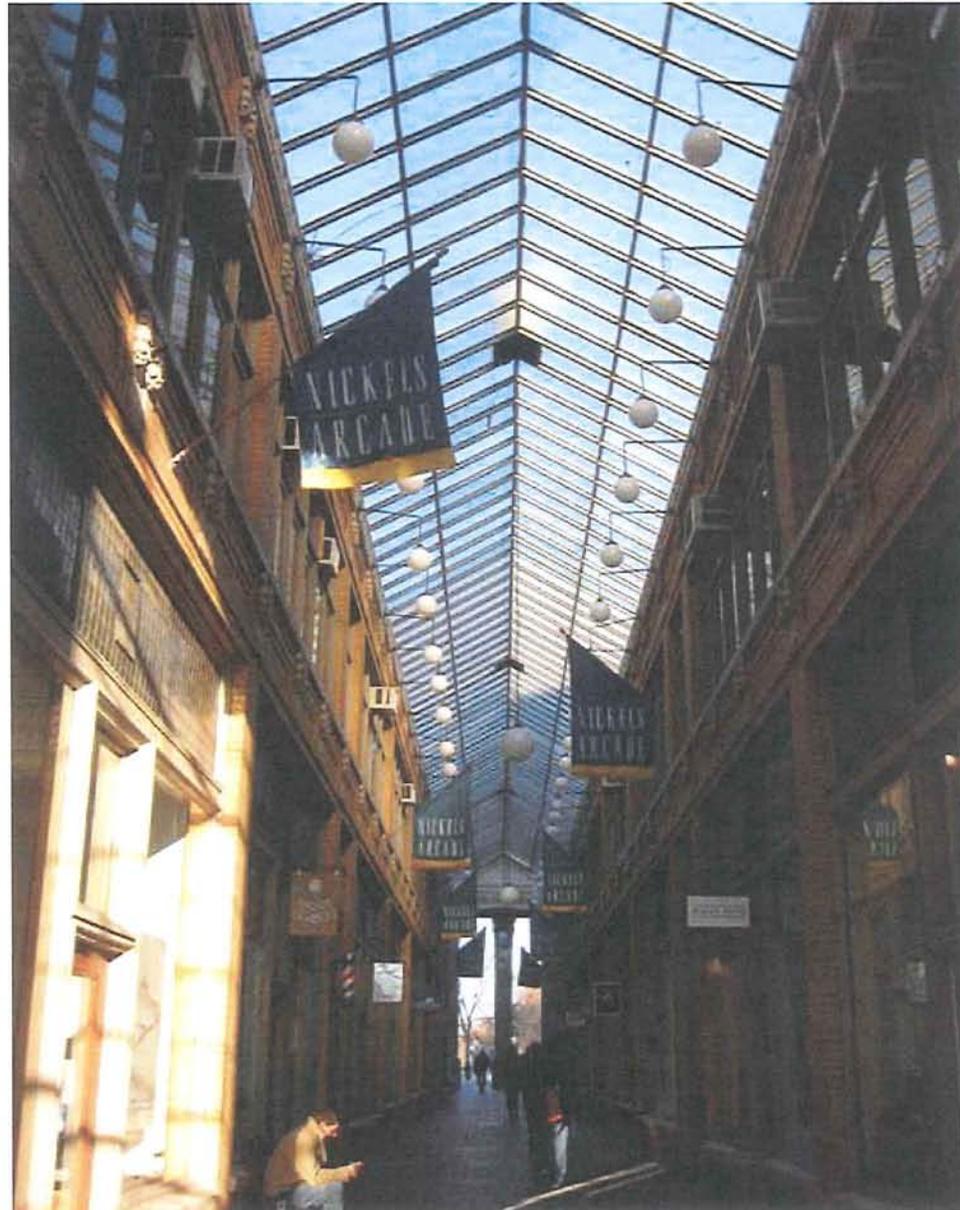
The Guidelines are general and intended to provide guidance to help in interpreting and applying the Standards to all rehabilitation projects. They are not meant to give case-specific advice. For instance, they cannot tell owners or developers which features in a historic building are important in defining the historic character and must be retained. This case-by-case determination is best accomplished by seeking assistance from qualified historic preservation professionals in the very early stages of project planning.

Like the Standards, the Guidelines pertain to historic buildings of all materials, construction types, sizes and occupancy; and apply to exterior and interior work, as well as new addi-

tions and the building's site and environment. The Guidelines are presented in a "Recommended" vs. "Not Recommended" format. Those approaches, treatments and techniques that are consistent with *The Secretary of the Interior's Standards for Rehabilitation* are listed in the "Recommended" column on the left; those approaches, treatments and techniques which could adversely affect a building's historic character are listed in the "Not Recommended" column on the right. To provide clear and consistent guidance for property owners, developers and federal agency managers, the "Recommended" courses of action are listed in order of historic preservation concerns so that a rehabilitation project may be successfully planned and completed—one that, first, assures the preservation of a building's important or "character-defining" architectural materials, features and spaces and, second, makes possible an efficient contemporary use. The guidance that follows begins with the most basic and least invasive approaches that will help the project achieve the desired goal, before considering work that may involve more change and potentially greater impact on the historic character of the building.

Sustainability

Before implementing any energy conservation measures to enhance the sustainability of a historic building, the existing energy-efficient characteristics of the building should be assessed. Buildings are more than their individual components. The design, materials, type of construction, size, shape, site orientation, surrounding landscape and climate all play a role in how buildings perform. Historic building construction methods and materials often maximized natural sources of heating, lighting and ventilation to respond to local climatic conditions. The key to a successful rehabilitation project is to identify and understand any lost original and existing energy-efficient aspects of the historic building, as well as to identify and understand its character-defining features to ensure they are preserved. The most sustainable building may be one that already exists. Thus, good preservation practice is often synonymous with sustainability. There are numerous treatments--traditional as well as new technological innovations--that may be used to upgrade a historic building to help it operate even more efficiently. Increasingly stricter energy standards and code requirements may dictate that at least some of these treatments be implemented as part of a rehabilitation project of any size or type of building. Whether a historic building is rehabilitated for a new or a continuing use, it is important to utilize the building's inherently-sustainable qualities as they were intended. It is equally important that they function effectively together with any new measures undertaken to further improve energy efficiency.



[15] Glass skylight illuminates historic shopping arcade.

16



17



[16-18] Inherently sustainable features of historic buildings: Shutters and a deep porch keep the interior cool in a historic house in a warm climate (top); a skylight provides natural light to the interior of this mid-20th century house (center); partially glazed partitions and doors allow natural light into the corridor of a historic office building (bottom).

18



PLANNING

RECOMMENDED

NOT RECOMMENDED

Forming an integrated sustainability team when working on a large project that includes a preservation professional to ensure that the character and integrity of the historic building is maintained during any upgrades.

Omitting preservation expertise from a sustainability project team.

Analyzing the condition of inherently-sustainable features of the historic building, such as shutters, storm windows, awnings, porches, vents, roof monitors, skylights, light wells, transoms and naturally-lit corridors, and including them in energy audits and energy modeling, before planning upgrades.

Ignoring inherently-sustainable features of the existing historic building when creating energy models and planning upgrades.

Identifying ways to reduce energy use, such as installing fixtures and appliances that conserve resources, including energy-efficient lighting or energy-efficient lamps in existing light fixtures, low-flow plumbing fixtures, sensors and timers that control water flow, lighting and temperature, before undertaking more invasive treatments that may negatively impact the historic building.

Prioritizing sustainable improvements, beginning with minimally invasive treatments that are least likely to damage historic building material.

Beginning work with substantive or irreversible treatments without first considering and implementing less invasive measures.

MAINTENANCE

RECOMMENDED	NOT RECOMMENDED
Maintaining historic buildings regularly to preserve historic fabric and maximize operational efficiency.	Delaying maintenance treatments which may result in the loss of historic building fabric or decrease the performance of existing systems or features.
Retaining and repairing durable historic building materials	Removing durable historic building materials and replacing them with materials perceived as more sustainable; for instance, removing historic heart pine flooring and replacing it with new bamboo flooring.
Using environmentally-friendly cleaning products that are compatible with historic finishes.	Using cleaning products potentially harmful to both historic finishes and the environment.
Using sustainable products and treatments, such as low VOC paints and adhesives and lead-safe paint removal methods, as much as possible, when rehabilitating a historic building.	



21



22

Not Recommended: [21-22] The peeling paint on an exterior window sill and on the interior of a window indicates that these features have not received regular maintenance. The broken casement window hardware also needs to be repaired to make the window operable.



19



20

Recommended: [19] Caulking the gap between the aluminum storm window and wood window frame helps maximize thermal efficiency in this historic residence.

[20] Using sustainable cleaning products preserves both the environment and the historic building.

23



24



Recommended: [23-25] Historic exterior storm windows have been well maintained and continue to perform as intended.

Recommended: [26] The new metal interior storm window was carefully matched to the exterior window as part of the rehabilitation of this historic armory building.

WINDOWS

RECOMMENDED

NOT RECOMMENDED

Maintaining windows on a regular basis to ensure that they function properly and are completely operable.

Neglecting to maintain historic windows and allowing them to deteriorate beyond repair with the result that they must be replaced.

Retaining and repairing historic windows when deteriorated.

Removing repairable historic windows and replacing them with new windows for perceived improvement in energy performance.

Weather stripping and caulking historic windows, when appropriate, to make them weather tight.

Installing interior or exterior storm windows or panels that are compatible with existing historic windows.

Replacing repairable historic windows with new insulated windows.

25



Not Recommended: [27] A broken sash cord can be repaired easily and does not justify replacement of the window.

26



27



WINDOWS

RECOMMENDED

Installing compatible and energy-efficient replacement windows that match the appearance, size, design, proportion and profile of the existing historic windows and that are also durable, repairable and recyclable, when existing windows are too deteriorated to repair.

Replacing missing windows with new, energy-efficient windows that are appropriate to the style of historic building and that are also durable, repairable and recyclable.

Retrofitting historic windows with high-performance glazing or clear film, when possible, and only if the historic character can be maintained.

NOT RECOMMENDED

Installing incompatible or inefficient replacement window units that are not durable, recyclable or repairable when existing windows are deteriorated beyond repair or missing.

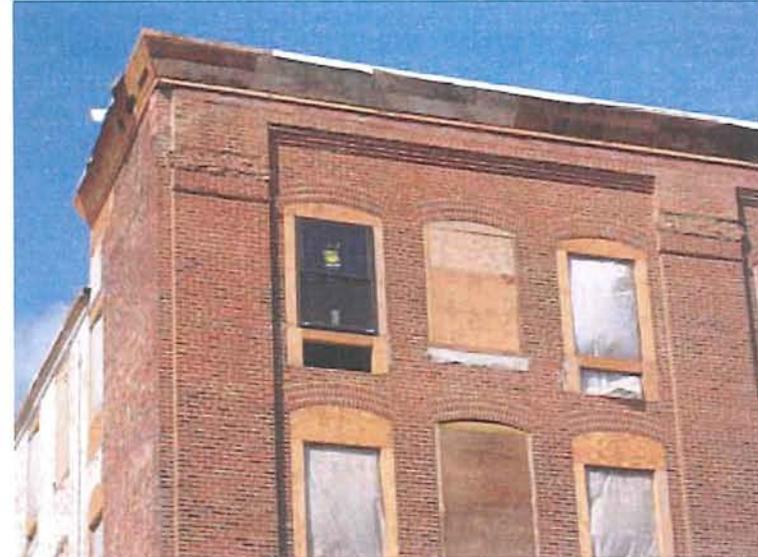


Recommended: [28-29] These exterior storm windows match the pane configuration of the historic interior windows in a residence and in a multi-story hotel building.



Not Recommended: [31-32] Ill-fitting exterior aluminum storm windows viewed from both inside and outside are clearly not energy efficient.

Not Recommended: [30] Not only have incompatible windows that do not fit the size and shape of the historic window openings been installed, but the original openings have also been shortened to install through-the-wall HVAC units.





34



35



Recommended: [33-35] Original metal windows were appropriately repaired as part of the rehabilitation of this historic industrial building.

WINDOWS

RECOMMENDED

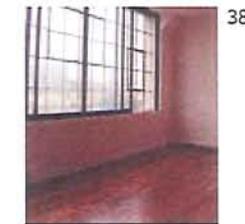
NOT RECOMMENDED

Retrofitting historic steel windows and curtain-wall systems to improve thermal performance without compromising their character.	
Installing clear, low-emissivity (low-e) glass or film without noticeable color in historically-clear windows to reduce solar heat gain.	Retrofitting historically-clear windows with tinted glass or reflective coatings that will negatively impact the historic character of the building.
Installing film in a slightly lighter shade of the same color tint when replacing glazing panels on historically-dark-tinted windows to improve daylighting.	Introducing clear glazing or a significantly lighter colored film or tint than the original to improve daylighting when replacing historically dark-tinted windows.

36



37



38

Recommended: [36-38] Original metal windows were retained and made operable during the rehabilitation of this historic mill complex. Installing patio slider doors as interior storm windows was a creative and successful solution to improve the energy efficiency of the existing windows.

WINDOWS

RECOMMENDED	NOT RECOMMENDED
Maintaining existing, reinstalling or installing new, historically-appropriate shutters and awnings.	Removing historic shutters and awnings or installing inappropriate ones.
Repairing or reopening historically-operable interior transoms, when possible, to improve air flow and cross ventilation.	Covering or removing existing transoms.



39

Recommended: [39-40] The original windows, which were deteriorated beyond repair, featured a dark tint. They were replaced with a slightly lighter-tinted glazing to improve daylighting in this mid-century modern office building.



41

Recommended: [41] Traditional canvas awnings should be retained when they exist on historic buildings.



40



Recommended: [42] Transoms and screen doors are distinctive and practical features that provided cross ventilation in this historic hotel.



43

Recommended: [43] The wall and door glazing ensures that the corridor receives natural daylight and the operable transom helps air to circulate in this historic office building.

WEATHERIZATION AND INSULATION

Recommended: [44-45] A blower door test is a useful tool to help identify air infiltration in a historic building before undertaking weatherization or retrofit treatments.
Top Photo: Robert J. Cagnetta, Heritage Restoration, Inc.



44



45

Recommended: [46] A hand-held infrared scanner reveals areas that are not well insulated and that allow heat transfer through the walls of a building.



46

Recommended: [47-48] Insulation should be installed first in unfinished areas such as attics, crawl spaces and basements of residential buildings.

RECOMMENDED

Using a variety of analytical tools, such as a comprehensive energy audit, blower door tests, infrared thermography, energy modeling or daylight modeling, to gain an understanding of the building's performance and potential before implementing any weatherization or retrofit treatments.

Developing a weatherization plan based on the results of the energy analysis of the building's performance and potential.

Eliminating infiltration first, beginning with the least invasive and most cost-effective weatherization measures, such as caulking and weather stripping, before undertaking more invasive weatherization measures.

Understanding the inherent thermal properties of the historic building materials and the actual insulating needs for the specific climate and building type before adding or changing insulation.

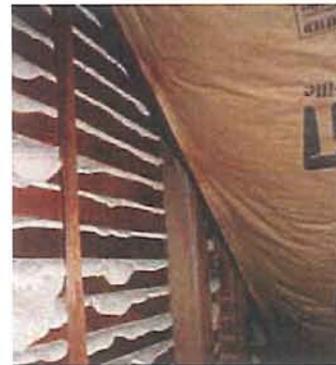
Insulating unfinished spaces, such as attics, basements and crawl spaces, first.

NOT RECOMMENDED

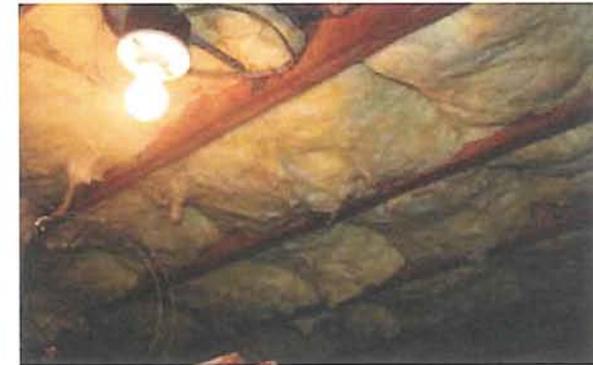
Implementing energy-retrofit measures without first diagnosing the building's performance and energy needs.

Undertaking treatments that result in loss of historic fabric, for example, installing wall insulation that requires removing plaster, before carrying out simple and less damaging weatherization measures.

Insulating a finished space, which requires removing historic plaster and trim, before insulating unfinished spaces.



47



48

WEATHERIZATION AND INSULATION

RECOMMENDED	NOT RECOMMENDED
Using the appropriate type of insulation in unfinished spaces and ensuring the space is adequately ventilated.	Using wet-spray or other spray-in insulation that is not reversible or may damage historic materials.
	Adding insulation in cavities that are susceptible to water infiltration.
Ensuring that air infiltration is reduced before adding wall insulation.	Insulating walls without first reducing air infiltration.
Installing appropriate wall insulation, only if necessary, after lower impact treatments have been carried out.	Installing wall insulation that is not reversible and that may cause damage to historic building materials.
	Installing insulation on the exterior of a historic building, which results in the loss of historic materials and may alter the proportion and relationship of the wall to the historic windows and trim.
Removing interior plaster only in limited quantities and when absolutely necessary to install appropriate insulation.	Removing all interior plaster to install appropriate insulation.
Replacing interior plaster—removed to install insulation—with plaster or gypsum board to retain the historic character of the interior, and in a manner that retains the historic proportion and relationship of the wall to the historic windows and trim.	Replacing interior plaster—removed to install insulation—with gypsum board that is too thick and that alters the historic proportion and relationship of the wall to the historic windows and trim.
Reinstalling historic trim that was removed to install insulation.	Replicating trim rather than retaining and reinstalling historic trim that is repairable.

Not Recommended: [49] The original proportion and relationship of the wall to the door trim has been all but lost because the gypsum board installed was too thick.

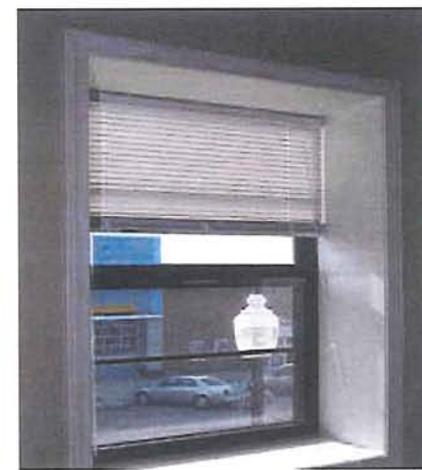
[50-51] When wall insulation was installed here the walls were furred out, which created deep, historically inappropriate window recesses. The repairable historic trim was also not reinstalled.



49



50



51

52



53



Recommended: [52-53] The original proportion and relationship of the wall to the windows and trim, which is important in defining the character of these historic interior spaces, has been retained here.

54



Recommended: [54] This rigid insulation has been correctly installed in the wall cavity so that when the gypsum board is hung the original proportion and relationship of the wall to the trim will be retained.
Photo: Robert J. Cagnetta, Heritage Restoration, Inc.

HEATING, VENTILATING AND AIR CONDITIONING (HVAC) AND AIR CIRCULATION

RECOMMENDED

NOT RECOMMENDED

Retaining and maintaining functional and efficient HVAC systems.	Replacing existing HVAC systems without testing their efficiency first.
Upgrading existing HVAC systems to increase efficiency and performance within normal replacement cycles.	Replacing HVAC systems prematurely when existing systems are operating efficiently.
Installing an energy-efficient system that takes into account whole building performance and retains the historic character of the building and site when a new HVAC system is necessary.	Installing an inefficient HVAC system or installing a new system based on pre-retrofit building performance when a smaller system may be more appropriate.

55



Recommended: [55-57]
Wood vents in the gable ends of a historic house and a barn and cast-iron oval vents in a masonry foundation traditionally helped air circulate.

56



57



HEATING, VENTILATING AND AIR CONDITIONING (HVAC) AND AIR CIRCULATION

RECOMMENDED	NOT RECOMMENDED
Supplementing the efficiency of HVAC systems with less energy-intensive measures, such as programmable thermostats, attic and ceiling fans, louvers and vents, where appropriate.	
Retaining or installing high efficiency, ductless air conditioners when appropriate, which may be a more sensitive approach than installing a new, ducted, central air-conditioning system that may damage historic building material.	Installing through-the-wall air conditioners, which damages historic material and negatively impacts the building's historic character.
	Installing a central HVAC system in a manner that damages historic building material.



60

Recommended: [60] Original radiators that are still functional and efficient were retained in the rehabilitation of this historic house.

58



Recommended: [58] Ceiling fans enhance the efficiency of HVAC systems in historic buildings.

59



Recommended: [59] Installing a programmable thermostat can help existing systems to operate more efficiently.



61

Not Recommended: [61] The cuts made in the brick and the decorative stone trim to install through-the-wall air conditioners have not only destroyed building material, but have also negatively impacted the character of this historic apartment building.

62



HEATING, VENTILATING AND AIR CONDITIONING (HVAC) AND AIR CIRCULATION

RECOMMENDED

NOT RECOMMENDED

Installing new mechanical ductwork sensitively or using a mini-duct system, so that ducts are not visible from the exterior and do not adversely impact the historic character of the interior space.	Installing new mechanical ductwork that is visible from the exterior or adversely impacts the historic character of the interior space.
Leaving interior ductwork exposed where appropriate, such as in industrial spaces, or when concealing the ductwork would destroy historic fabric.	Leaving interior ductwork exposed in highly-finished spaces where it would negatively impact the historic character of the space.
Leaving interior ductwork exposed and painting it, when concealing it would negatively impact historic fabric, such as a historic pressed metal ceiling.	Leaving exposed ductwork unpainted in finished interior spaces, such as those with a pressed metal ceiling.
Placing HVAC equipment where it will operate effectively and efficiently and be minimally visible and will not negatively impact the historic character of the building or its site.	Placing HVAC equipment in highly-visible locations on the roof or on the site where it will negatively impact the historic character of the building or its site.

63



64



65



66

Recommended: [62-63] Carefully installed new mechanical ductwork is barely visible in the elaborately decorated ceiling of this historic theater.
 [64] The ductwork has been left unpainted which is compatible with this historic industrial interior.
 [65] To avoid damaging the metal ceiling, the ductwork was left exposed and it was painted to minimize its impact, thus preserving the historic character of this former bank.

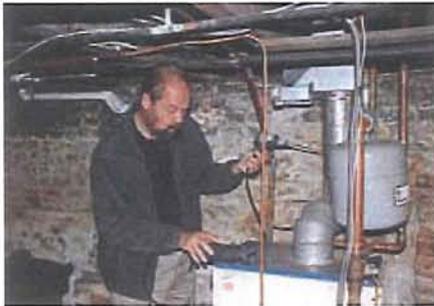
Not Recommended: [66] Interior ductwork has been inappropriately left exposed and unpainted here in this traditionally-finished school entrance hall.

HEATING, VENTILATING AND AIR CONDITIONING (HVAC) AND AIR CIRCULATION

RECOMMENDED

NOT RECOMMENDED

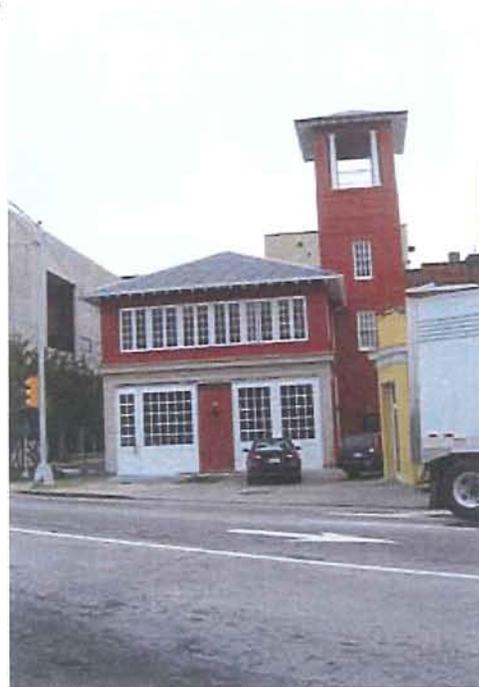
Commissioning or examining the performance of the HVAC system and continuing to examine it regularly to ensure that it is operating efficiently.	Installing a new HVAC system without commissioning or testing its efficiency after installation.
Investigating whether a geothermal heat pump will enhance the heating and cooling efficiency of the building before installing one.	Installing a geothermal heat pump without evidence that it will improve the heating and cooling efficiency of the building.
	Installing a geothermal system where there is a significant landscape or where there are archeological resources that could be damaged.



67

Recommended:[67] A professional energy auditor analyzes the performance of an existing furnace to ensure it is operating efficiently.

[68-69] A geothermal system, evidenced by a panel in the sidewalk, was installed on the site of this historic firehouse during rehabilitation.



70

68

Recommended: [70-71] A geothermal system was installed on the property of this historic mansion, but only after an archeological investigation was conducted of the grounds.



71



69

SOLAR TECHNOLOGY

72



73



Recommended: [72-73] Solar panels were installed appropriately on the rear portion of the roof on this historic row house that are not visible from the primary elevation.

RECOMMENDED

Considering on-site, solar technology only after implementing all appropriate treatments to improve energy efficiency of the building, which often have greater life-cycle cost benefit than on-site renewable energy.

Analyzing whether solar technology can be used successfully and will benefit a historic building without compromising its character or the character of the site or the surrounding historic district.

Installing a solar device in a compatible location on the site or on a non-historic building or addition where it will have minimal impact on the historic building and its site.

Installing a solar device on the historic building only after other locations have been investigated and determined infeasible.

NOT RECOMMENDED

Installing on-site, solar technology without first implementing all appropriate treatments to the building to improve its energy efficiency.

Installing a solar device without first analyzing its potential benefit or whether it will negatively impact the character of the historic building or site or the surrounding historic district.

Placing a solar device in a highly-visible location where it will negatively impact the historic building and its site.

Installing a solar device on the historic building without first considering other locations.



74

Recommended: [74] Free-standing solar panels have been installed here that are visible but appropriately located at the rear of the property and compatible with the character of this industrial site.



75

Not Recommended: [75] Solar roof panels have been installed at the rear, but because the house is situated on a corner, they are highly visible and negatively impact the character of the historic property.

SOLAR TECHNOLOGY

RECOMMENDED

NOT RECOMMENDED

Installing a low-profile solar device on the historic building so that it is not visible or only minimally visible from the public right of way: for example, on a flat roof and set back to take advantage of a parapet or other roof feature to screen solar panels from view; or on a secondary slope of a roof, out of view from the public right of way.	Installing a solar device in a prominent location on the building where it will negatively impact its historic character.
Installing a solar device on the historic building in a manner that does not damage historic roofing material or negatively impact the building's historic character and is reversible.	Installing a solar device on the historic building in a manner that damages historic roofing material or replaces it with an incompatible material and is not reversible.
	Removing historic roof features to install solar panels.
	Altering a historic, character-defining roof slope to install solar panels.
	Installing solar devices that are not reversible.
Installing solar roof panels horizontally -- flat or parallel to the roof—to reduce visibility.	Placing solar roof panels vertically where they are highly visible and will negatively impact the historic character of the building.

76



77



79



Not Recommended: [79] Although installing solar panels behind a rear parking lot might be a suitable location in many cases, here the panels negatively impact the historic property on which they are located.

Recommended: [76-77] Solar panels, which also serve as awnings, were installed in secondary locations on the side and rear of this historic post office and cannot be seen from the front of the building. [78] Solar panels placed horizontally on the roof of this historic building are not visible from below.

78



WIND POWER—WIND TURBINES AND WINDMILLS

80



Recommended: [80] It is often best to install wind-powered equipment in off-site, rural locations to avoid negatively impacting a historic building and its site.

[81] This wind turbine is located in a large parking lot next to a historic manufacturing complex and it is compatible with the character of the industrial site.

[82] This 2011 Kansas postage stamp features a traditional windmill and modern wind turbines to illustrate the importance of wind power in the growth of the state.

RECOMMENDED

Considering on-site, wind-power technology only after implementing all appropriate treatments to the building to improve energy efficiency, which often have greater life-cycle cost benefit than on-site renewable energy.

Analyzing whether wind-power technology can be used successfully and will benefit a historic building without compromising its character or the character of the site or the surrounding historic district.

Installing wind-powered equipment in an appropriate location on the site or on a non-historic building or addition where it will not negatively impact the historic character of the building, the site or the surrounding historic district.

NOT RECOMMENDED

Installing on-site, wind-power technology, without first implementing all appropriate treatments to the building to improve energy efficiency.

Installing wind-powered equipment without first analyzing its potential benefit or whether it will negatively impact the character of the historic building or the site or the surrounding historic district.

Placing wind-powered equipment on the site where it is highly visible when it is not compatible with the historic character of the site.

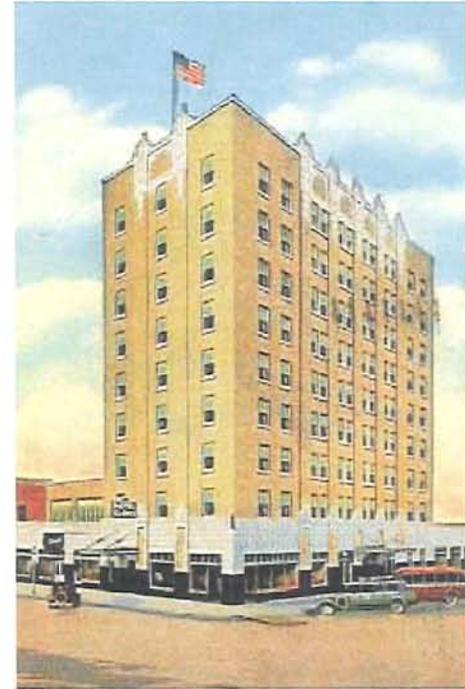
81



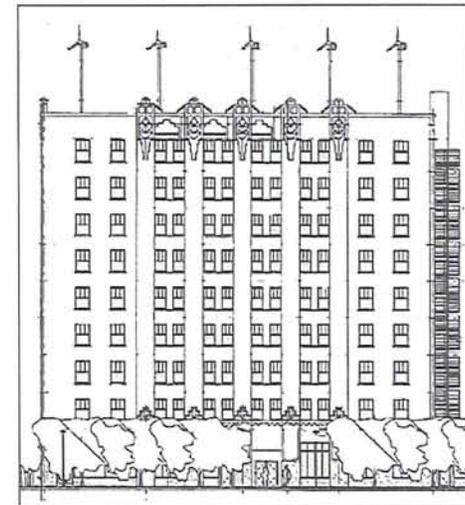
82

WIND POWER—WIND TURBINES AND WINDMILLS

RECOMMENDED	NOT RECOMMENDED
Installing wind-powered equipment on the historic building without damaging the roof or walls or otherwise negatively impacting the building's historic character.	Installing wind-powered equipment on the historic building in a manner that damages the roof, compromises its structure or negatively impacts the building's historic character.
	Removing historic roof features to install wind-powered equipment, such as wind turbines.
	Installing wind-powered equipment on the historic building that is not reversible.
	Installing wind-powered equipment on the primary façade of a historic building or where it is highly visible.
Investigating off-site, renewable energy options when installing on-site wind-power equipment would negatively impact the historic character of the building or site.	



84



83

Not Recommended:
 [83-84] This historic hotel is a prominent and highly visible local landmark, and the wind turbines proposed to be added on the roof would negatively impact its historic character.

ROOFS—COOL ROOFS AND GREEN ROOFS



86



Recommended: [85-86] A cool or green roof is best installed on a flat roof where it cannot be seen from the public right of way and will not negatively impact the character of the historic building.

RECOMMENDED	NOT RECOMMENDED
Retaining and repairing durable, character-defining historic roofing materials in good condition.	Replacing durable, character-defining historic roofing materials in good condition with a roofing material perceived as more sustainable.
Analyzing whether a cool roof or a green roof is appropriate for the historic building.	
Installing a cool roof or a green roof on a flat-roofed historic building where it will not be visible from the public right of way and will not negatively impact the building's historic character.	Installing a cool roof or a green roof without considering whether it will be highly visible from the public right of way and will negatively impact the building's historic character.
Selecting appropriate roofing materials and colors when putting a new cool roof on the historic building.	Installing a cool roof that is incompatible in material or color with the historic building.
Ensuring that the historic building can structurally accommodate the added weight of a green roof and sensitively improving the structural capacity, if necessary.	Adding a green roof that would be too heavy and would damage the historic building or supplementing the structural capacity of the historic building in an insensitive manner.

87



Not Recommended: [87] Historic roofing materials in good condition should be retained rather than replaced with another material perceived as more sustainable, such as, in this case, solar roofing shingles.

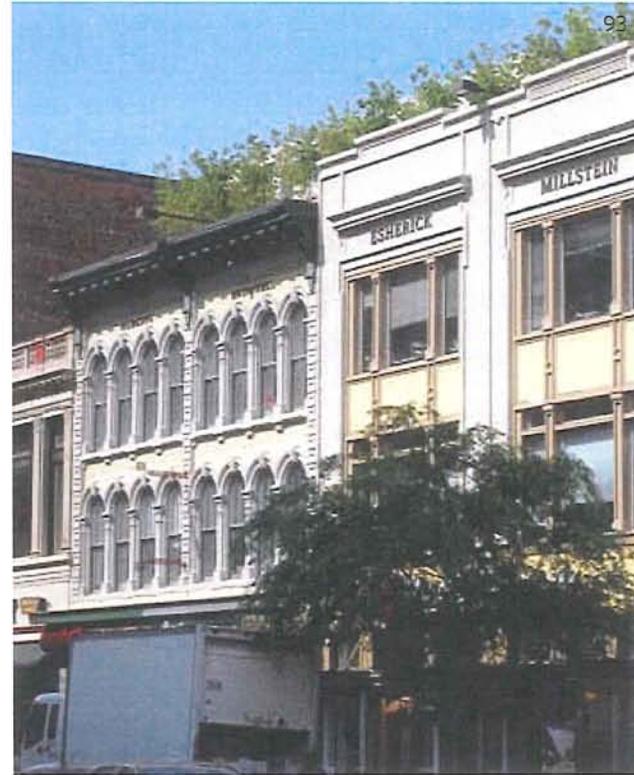
88



Not Recommended: [88] This new, cool white metal roof is not an appropriate material or color for this historic mid-20th century house.

ROOFS—COOL ROOFS AND GREEN ROOFS

RECOMMENDED	NOT RECOMMENDED
Ensuring that the roof is water tight and that roof drains, gutters and downspouts function properly before installing a green roof.	Installing a green roof without ensuring that the roof covering is water tight and that drainage systems function properly.
Including a moisture-monitoring system when installing a green roof to protect the historic building from added moisture and accidental leakage.	
Selecting sustainable native plants that are drought resistant and will not require excessive watering of a green roof.	
Selecting appropriately-scaled vegetation for a green roof that will not grow so tall that it will be visible above the roof or parapet.	Selecting vegetation for a green roof that will be visible above the roof or parapet.



Not Recommended: [93] The vegetation on these green roofs has grown too tall and negatively impacts the character of these historic commercial buildings.

89



Recommended: [89-92] Low-scale and sustainable native plants are appropriate for these roof gardens on historic buildings.



90-91



92

94



95



Recommended: [94-95] Permeable pavers were used at this historic residential property for a driveway and parking (above) and a hard-packed, construction aggregate provides environmentally-friendly paths for visitors at this historic site (below).

[96] Mature trees and a water feature contribute to the sustainability of this mid-twentieth century property.

96



SITE FEATURES AND WATER EFFICIENCY

RECOMMENDED

NOT RECOMMENDED

Respecting an important cultural landscape and significant character-defining site features when considering adding new sustainable features to the site.

Installing new sustainable site features without considering their potentially negative impact on an important cultural landscape and character-defining site features.

Using to advantage existing storm-water-management features, such as gutters, downspouts and cisterns, as well as site topography and vegetation that contribute to the sustainability of the historic property.

Ignoring existing features that contribute to the sustainability of the historic property.

Adding natural, sustainable features to the site, such as shade trees, if appropriate, to reduce cooling loads for the historic building.

Removing existing natural features, such as shade trees, that contribute to the building's sustainability.

Using permeable paving where appropriate on a historic building site to manage storm water.

Planting trees where they may grow to encroach upon or damage the historic building.

97



Not Recommended: [97] This tree, which was planted too close to the building, has caused the masonry wall to retain moisture that damaged the mortar and required that the brick be repointed in this area.

SITE FEATURES AND WATER EFFICIENCY

RECOMMENDED	NOT RECOMMENDED
Avoiding paving up to the building foundation to reduce heat island effect, building temperature, damage to the foundation and storm-water runoff.	Paving up to the building foundation with impermeable materials.
Landscaping with native plants, if appropriate, to enhance the sustainability of the historic site.	Introducing non-native plant species to the historic site that are not sustainable.
Adding features, such as bioswales, rain gardens, rain barrels, large collection tanks and cisterns, if compatible, to the historic building site to enhance storm-water management and on-site water reuse.	

98



Recommended: [98-100] Rain gardens and rain-water collection tanks are features that may be added to a historic property to improve storm-water management and increase on-site water use.

99



100



101

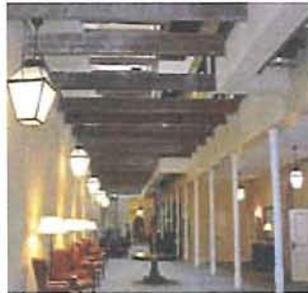


Not Recommended: [101] Splash back from the impermeable concrete paving next to the foundation is damaging these stones.



102

Recommended: [102-103]
Small, covered atriums that are compatible with the character of these historic warehouses have been inserted to light the interior.



103

Not Recommended: [104-106]
Skylights added on a primary roof elevation negatively impact the character of these historic houses.



104



105



106

DAYLIGHTING

RECOMMENDED

NOT RECOMMENDED

Retaining features that provide natural light to corridors, such as partial glass partitions, glazed doors and transoms, commonly found in historic office buildings.

Removing or covering features that provide natural light to corridors, such as partial glass partitions, glazed doors and transoms, commonly found in historic office buildings.

Reopening historic windows that have been blocked in to add natural light and ventilation.

Blocking in historic window openings to accommodate new building uses.

Adding skylights or dormers on secondary roof elevations where they are not visible or are only minimally visible so that they do not negatively impact the building's historic character.

Adding skylights or dormers on primary or highly-visible roof elevations where they will negatively impact the building's historic character.

Adding a small light well or light tubes, where necessary and appropriate, to allow more daylight into the historic building.

Inserting a small atrium, only when necessary, to allow more daylight into the building in a manner that is compatible with the historic character of the building.

Cutting a very large atrium into the historic building that is not compatible with the building's historic character.

Creating an open, uncovered atrium or courtyard in the historic building that appears to be an outdoor space, rather than an interior space.

DAYLIGHTING

RECOMMENDED

NOT RECOMMENDED

Installing light-control devices on the historic building where appropriate to the building type, such as light shelves in industrial or mid-century modern buildings, awnings on some commercial and residential buildings and shutters on residential buildings that had them historically.	Installing light-control devices that are incompatible with the type or style of the historic building.
Installing automated daylighting controls on interior lighting systems that ensure adequate indoor lighting and allow for energy-saving use of daylighting.	
Adding new window openings on secondary and less visible facades, where appropriate, to allow more natural light into the historic building.	Adding new window openings on primary elevations that will negatively impact the character of the historic building.



110

Recommended: [110] A clerestory window lights the interior corridor of this historic mill building.

111

[111] A limited number of new window openings may be added to non-character-defining, secondary facades to allow natural light into formerly windowless spaces.

107



Recommended: [107] Traditional canopies compatible with the industrial character of this former factory building were installed when it was converted for residential use.

[108-109] The original, partially-glazed doors and office partitions, as well as skylights, that let natural light into the corridors were retained as part of the rehabilitation of this early-20th century building.



108



109

Paleontological (fossil) laws Florida and Federal

Select Year: 2001

The 2001 Florida Statutes

[Title XVI](#)
Education

[Chapter 240](#)
Postsecondary Education

[View Entire Chapter](#)

¹240.516 Vertebrate paleontological sites and remains; legislative intent and state policy.--

(1) It is the declared intention of the Legislature that vertebrate paleontological sites be protected and preserved and that, pursuant thereto, vertebrate paleontological field investigation activities, including, but not limited to, collection, excavation, salvage, restoration, and cataloging of fossils, be discouraged except when such activities are carried on in accordance with both the provisions and the spirit of this act. However, it is not the intention of the Legislature that the provisions of this act impede mining or quarrying for rock, gravel, fill, phosphate, and other minerals, or the construction of canals or similar excavations, when such activities are permitted by law. Rather, it is the intent of the Legislature that mine and heavy equipment operators be encouraged to cooperate with the state in preserving its vertebrate paleontological heritage and vertebrate fossils by notifying the Florida Museum of Natural History whenever vertebrate fossils are discovered during mining or digging operations and by allowing such fossils to be properly salvaged and that persons having knowledge of vertebrate paleontological sites be encouraged to communicate such information to the museum.

(2) It is hereby declared to be the public policy of this state to protect and preserve vertebrate paleontological sites containing vertebrate fossils, including bones, teeth, natural casts, molds, impressions, and other remains of prehistoric fauna, and to provide for the collection, acquisition, and study of the vertebrate fossils of the state which offer documentation of the diversity of life on this planet.

(3) It is further declared to be the public policy of the state that all vertebrate fossils found on state-owned lands, including submerged lands and uplands, belong to the state with title to the fossils vested in the Florida Museum of Natural History for the purpose of administration of ss. [240.516-240.5163](#).

History.--ss. 1, 2, ch. 84-316; s. 58, ch. 86-163; s. 8, ch. 88-241; s. 3(7), ch. 2000-321.

¹**Note.--**Repealed January 7, 2003, by s. 3(7), ch. 2000-321, and shall be reviewed by the Legislature prior to that date.

Note.--Former s. 267.15.

Florida Fossil Permit

FLORIDA STATUTES § 240.516 sets forth the State of Florida's declared intent to Protect and preserve vertebrate fossils and vertebrate paleontology sites. All vertebrate fossils found on lands owned or leased by the state belong to the state with title thereto vested in the Florida Museum of Natural History. Field collection of vertebrate fossils may be conducted under the authority of a permit issued by the Program of Vertebrate Paleontology in accordance with FS § 240.516 F.S. and the University of Florida RULE 6C1-7.541 F.A.C. The purpose of the fossil collecting permit is not only to manage this non-renewable part of Florida's heritage, but to help paleontologists learn more about the range and distribution of the state's fossil animals.

WHAT AREAS ARE COVERED?

The state intends to encourage preservation of its heritage wherever vertebrate fossils are discovered; the state encourages all persons having knowledge of such fossils to notify the Program of Vertebrate Paleontology at the Florida Museum of Natural History. A permit is required for most collecting activities on all lands owned or leased by the state. This includes sites located either on submerged lands or uplands. Please note that existing regulations prohibit collecting in state parks and certain other managed areas. Check the regulations to see if your activities are covered.

WHAT OBJECTS ARE COVERED?

It is Florida's public policy to protect and preserve all vertebrate fossils, including bones, teeth, natural casts, molds, impressions, and other remains of prehistoric animals. Fossil sharks teeth are specifically excluded from these regulations, as are fossil plants and Invertebrates, including shells, so no permit is required to collect these specimens.

WHO MAY OBTAIN A PERMIT?

Any person with an interest in Florida vertebrate fossils may apply for a permit.

WHO MUST OBTAIN A PERMIT?

Any person or entity buying, selling or trading vertebrate fossils found on or under state-owned or leased land; and/or Any person or entity engaged in the systematic collection, acquisition, or restoration of vertebrate fossils found on state-owned or leased land. "Systematic collection" is hereby characterized by one or more of the following three features:

1. Volume of collections of vertebrate fossils in excess of one gallon at one site;
2. Use of any power-driven machinery or mechanical excavating tools of any size or hand tools greater than two (2) feet in length;
3. the collection, acquisition, excavation, salvage, exhumation or restoration of vertebrate fossils at a site on more than three days or a maximum of twenty-four hours during a period of one year.

HOW IS A PERMIT OBTAINED?

Any person wishing to engage in field collection of vertebrate fossils on land owned or leased by the state of Florida should apply for a permit by printing out and completing the application form below and mailing it to: THE FLORIDA PROGRAM OF VERTEBRATE PALEONTOLOGY, Florida Museum of Natural History, University of Florida, Gainesville, Florida 32611-7800, USA. The application must be accompanied by a self-identification document such as a copy of the applicant's birth certificate, driver's license, passport, or Social Security card, and a check or money order for \$5.00 US made payable to the PROGRAM OF VERTEBRATE PALEONTOLOGY. A permit shall be issued for one year. A multiple-user permit will be granted to an individual representing an organization or institution.

WHAT OBLIGATIONS DOES A PERMIT CARRY?

As a permit holder you can help unlock the secrets of Florida's fossil heritage and preserve this knowledge for future generations. Each year permittees add new discoveries to Florida's fossil heritage. The holder of a permit must report any unusual specimen or unusually rich site to the PROGRAM OF VERTEBRATE PALEONTOLOGY as soon as possible. At any convenient time, no later than the end of the permit year, the permit holder shall submit to the PROGRAM OF VERTEBRATE PALEONTOLOGY a list of all vertebrate fossils collected during the permit year along with appropriate locality information; or the actual collections with appropriate locality information. If within sixty (60) days of receipt of the list or the actual collection the PROGRAM OF VERTEBRATE PALEONTOLOGY does not request the permittee to donate one or more of the fossils collected, they may be released as 'non-essential fossils' to be disposed of however the permit holder may choose.

Questions about fossil vertebrates may be directed to:
Russ McCarty
Program of Vertebrate Paleontology
Florida Museum of Natural History
University of Florida
Gainesville, Florida 32611
Tel: (352)392-1721
E-mail: cormac@flmnh.ufl.edu

Florida Fossil Permit Application

This application is for a permit that will entitle the person named on the permit to collect, for the period of one (1) year, vertebrate fossils on land owned or leased by the State of Florida. The permittee must abide by all the provisions contained in Florida Statutes § 240.516 and the University of Florida Regulation implementing this law.
Mail the completed application to:

Program of Vertebrate Paleontology
Florida Museum of Natural History
University of Florida
Gainesville, Florida 32611-7800, USA

The following are to be enclosed with the application:
Copy of applicant's identification as stated above;
Check or money order for \$5.00 in U.S. currency payable to the Program of Vertebrate Paleontology. PLEASE DO NOT SEND CASH.

Applicant's Name: _____

Address: _____

Telephone (include area code): _____

I, the undersigned, affirm that I will abide by Florida Statutes § 240.516 and the Regulations of the Program of Vertebrate Paleontology, University of Florida Rule 6C1-7.541 F.A.C.

Signature: _____

Date: _____



NEW FOSSIL
PRESERVATION LAW

[Paleontological Resources
Preservation Act](#)

[Useful Resources](#)

[FAQs](#)

[Contact Us](#)

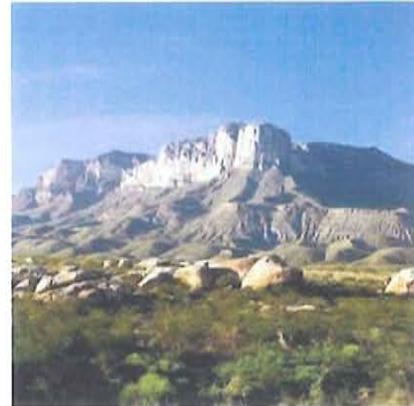
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New Fossil Preservation Law

On March 30, 2009, President Obama approved H.R. 146, the Omnibus Public Land Management Act of 2009, as Public Law 111-11. Title VI, Subtitle D of the act directs the Secretaries of the Interior and Agriculture to implement a comprehensive paleontological resource management program on federal lands. The requirements in Subtitle D will provide increased protection, enhanced management tools, and greater scientific and public understanding of NPS fossil resources.

The Paleontological Resources Preservation Act (PRPA) requires the agencies to 1) promulgate regulations as soon as practical; 2) develop plans for fossil inventories, monitoring, and scientific and educational use; 3) manage and protect paleontological resources on Federal land using scientific principles and expertise; 4) establish a program to increase public awareness about the significance of paleontological resources; 5) allow casual collection of common invertebrate and plant fossils on BLM, Forest Service and Bureau of Reclamation lands where consistent with the laws governing those lands; 6) manage fossil collection via specific permitting requirements; 7) curate collected fossils in accordance with the Act's requirements; 8) implement the Act's criminal and civil enforcement, penalty, reward and forfeiture provisions; and 9) protect information about the nature and specific location of fossils where warranted. The Act authorizes appropriations necessary to carry out these requirements.

[see PRPA text...](#)



Paleontological resources (fossils) have been documented in over 231 NPS units, including this ancient coral reef at Guadalupe Mountains National Park, Texas. Photo by NPS.

A coordinated federal approach is planned for implementing many of the Act's provisions, including the development of regulations. The NPS lead office in the implementation of the Act will be the Geologic Resources Division (GRD). GRD will work closely with parks and regions throughout this process.

Based on available data, 231 units are known to contain fossil resources either in-situ, in museum collections, and/or in a cultural context. This number is likely to increase as future inventories are completed, NPS museum collections contain more than 445,000 cataloged paleontological specimens.

Last updated: May 20, 2010



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NEW FOSSIL
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Paleontological Resources Preservation Act

P.L. 111-011

Omnibus Public Land Management Act of 2009

Subtitle D--Paleontological Resources Preservation

SEC. 6301. DEFINITIONS.

In this subtitle:

(1) **CASUAL COLLECTING**- The term `casual collecting' means the collecting of a reasonable amount of common invertebrate and plant paleontological resources for non-commercial personal use, either by surface collection or the use of non-powered hand tools resulting in only negligible disturbance to the Earth's surface and other resources. As used in this paragraph, the terms `reasonable amount', `common invertebrate and plant paleontological resources' and `negligible disturbance' shall be determined by the Secretary.

(2) **FEDERAL LAND**- The term `Federal land' means--

(A) land controlled or administered by the Secretary of the Interior, except Indian land; or

(B) National Forest System land controlled or administered by the Secretary of Agriculture.

(3) **INDIAN LAND**- The term `Indian Land' means land of Indian tribes, or Indian individuals, which are either held in trust by the United States or subject to a restriction against alienation imposed by the United States.

(4) **PALEONTOLOGICAL RESOURCE**- The term `paleontological resource' means any fossilized remains, traces, or imprints of organisms, preserved in or on the earth's crust, that are of paleontological interest and that provide information about the history of life on earth, except that the term does not include--

(A) any materials associated with an archaeological resource (as defined in section 3(1) of the Archaeological Resources Protection Act of 1979 (16 U.S.C. 470bb(1)); or

(B) any cultural item (as defined in section 2 of the Native American Graves Protection and Repatriation Act (25 U.S.C. 3001)).

(5) **SECRETARY**- The term `Secretary' means the Secretary of the Interior with respect to land controlled or administered by the Secretary of the Interior or the Secretary of Agriculture with respect to National Forest System land controlled or administered by the Secretary of Agriculture.

(6) **STATE**- The term `State' means the 50 States, the District of Columbia, the Commonwealth of Puerto Rico, and any other territory or possession of the United States.

SEC. 6302. MANAGEMENT.

(a) **In General**- The Secretary shall manage and protect paleontological resources on Federal land using scientific principles and expertise. The Secretary shall develop appropriate plans for inventory, monitoring, and the scientific and educational use of paleontological resources, in accordance with applicable agency laws, regulations, and policies. These plans shall emphasize interagency coordination and collaborative efforts where possible with non-Federal partners, the scientific community, and the general public.

(b) **Coordination**- To the extent possible, the Secretary of the Interior and the Secretary of Agriculture shall coordinate in the implementation of this subtitle.

SEC. 6303. PUBLIC AWARENESS AND EDUCATION PROGRAM.

The Secretary shall establish a program to increase public awareness about the significance of paleontological resources.

SEC. 6304. COLLECTION OF PALEONTOLOGICAL RESOURCES.

(a) **Permit Requirement**-

(1) **IN GENERAL**- Except as provided in this subtitle, a paleontological resource may not be collected from Federal land without a permit issued under this subtitle by the Secretary.



(2) *CASUAL COLLECTING EXCEPTION-* The Secretary shall allow casual collecting without a permit on Federal land controlled or administered by the Bureau of Land Management, the Bureau of Reclamation, and the Forest Service, where such collection is consistent with the laws governing the management of those Federal land and this subtitle.

(3) *PREVIOUS PERMIT EXCEPTION-* Nothing in this section shall affect a valid permit issued prior to the date of enactment of this Act.

(b) *Criteria for Issuance of a Permit-* The Secretary may issue a permit for the collection of a paleontological resource pursuant to an application if the Secretary determines that--

- (1) the applicant is qualified to carry out the permitted activity;
- (2) the permitted activity is undertaken for the purpose of furthering paleontological knowledge or for public education;
- (3) the permitted activity is consistent with any management plan applicable to the Federal land concerned; and
- (4) the proposed methods of collecting will not threaten significant natural or cultural resources.

(c) *Permit Specifications-* A permit for the collection of a paleontological resource issued under this section shall contain such terms and conditions as the Secretary deems necessary to carry out the purposes of this subtitle. Every permit shall include requirements that--

- (1) the paleontological resource that is collected from Federal land under the permit will remain the property of the United States;
- (2) the paleontological resource and copies of associated records will be preserved for the public in an approved repository, to be made available for scientific research and public education; and
- (3) specific locality data will not be released by the permittee or repository without the written permission of the Secretary.

(d) *Modification, Suspension, and Revocation of Permits-*

(1) The Secretary may modify, suspend, or revoke a permit issued under this section--

- (A) for resource, safety, or other management considerations; or
- (B) when there is a violation of term or condition of a permit issued pursuant to this section.

(2) The permit shall be revoked if any person working under the authority of the permit is convicted under section 6306 or is assessed a civil penalty under section 6307.

(e) *Area Closures-* In order to protect paleontological or other resources or to provide for public safety, the Secretary may restrict access to or close areas under the Secretary's jurisdiction to the collection of paleontological resources.

SEC. 6305. CURATION OF RESOURCES.

Any paleontological resource, and any data and records associated with the resource, collected under a permit, shall be deposited in an approved repository. The Secretary may enter into agreements with non-Federal repositories regarding the curation of these resources, data, and records.

SEC. 6306. PROHIBITED ACTS; CRIMINAL PENALTIES.

(a) *In General-* A person may not--

- (1) excavate, remove, damage, or otherwise alter or deface or attempt to excavate, remove, damage, or otherwise alter or deface any paleontological resources located on Federal land unless such activity is conducted in accordance with this subtitle;
- (2) exchange, transport, export, receive, or offer to exchange, transport, export, or receive any paleontological resource if the person knew or should have known such resource to have been excavated or removed from Federal land in violation of any provisions, rule, regulation, law, ordinance, or permit in effect under Federal law, including this subtitle; or
- (3) sell or purchase or offer to sell or purchase any paleontological resource if the person knew or should have known such resource to have been excavated, removed, sold, purchased, exchanged, transported, or received from Federal land.

(b) *False Labeling Offenses-* A person may not make or submit any false record, account, or label for, or any false identification of, any paleontological resource excavated or removed from Federal land.

(c) *Penalties-* A person who knowingly violates or counsels, procures, solicits, or employs another person to violate subsection (a) or (b) shall, upon conviction, be fined in accordance with title 18, United States Code, or imprisoned not more than 5 years, or both; but if the sum of the commercial and paleontological value of the paleontological resources involved and the cost of restoration and repair of such resources does not exceed \$500, such person shall be fined in accordance with title 18, United States Code, or imprisoned not more than 2 years, or both.

(d) *Multiple Offenses-* In the case of a second or subsequent violation by the same person, the amount of the penalty assessed under subsection (c) may be doubled.

(e) *General Exception-* Nothing in subsection (a) shall apply to any person with respect to any paleontological resource which was in the lawful possession of such person prior to the date of enactment of this Act.

SEC. 6307. CIVIL PENALTIES.

(a) *In General-*

(1) *HEARING-* A person who violates any prohibition contained in an applicable regulation or permit issued under this subtitle may be assessed a penalty by the Secretary after the person is given notice and opportunity for a hearing with respect to the violation. Each violation shall be considered a separate offense for purposes of this section.

(2) *AMOUNT OF PENALTY-* The amount of such penalty assessed under paragraph (1) shall be determined under regulations promulgated pursuant to this subtitle, taking into account the following factors:

(A) The scientific or fair market value, whichever is greater, of the paleontological resource involved, as determined by the Secretary.

(B) The cost of response, restoration, and repair of the resource and the paleontological site involved.

(C) Any other factors considered relevant by the Secretary assessing the penalty.

(3) *MULTIPLE OFFENSES-* In the case of a second or subsequent violation by the same person, the amount of a penalty assessed under paragraph (2) may be doubled.

(4) *LIMITATION-* The amount of any penalty assessed under this subsection for any 1 violation shall not exceed an amount equal to double the cost of response, restoration, and repair of resources and paleontological site damage plus double the scientific or fair market value of resources destroyed or not recovered.

(b) *Petition for Judicial Review; Collection of Unpaid Assessments-*

(1) *JUDICIAL REVIEW-* Any person against whom an order is issued assessing a penalty under subsection (a) may file a petition for judicial review of the order in the United States District Court for the District of Columbia or in the district in which the violation is alleged to have occurred within the 30-day period beginning on the date the order making the assessment was issued. Upon notice of such filing, the Secretary shall promptly file such a certified copy of the record on which the order was issued. The court shall hear the action on the record made before the Secretary and shall sustain the action if it is supported by substantial evidence on the record considered as a whole.

(2) *FAILURE TO PAY-* If any person fails to pay a penalty under this section within 30 days--

(A) after the order making assessment has become final and the person has not filed a petition for judicial review of the order in accordance with paragraph (1); or

(B) after a court in an action brought in paragraph (1) has entered a final judgment upholding the assessment of the penalty, the Secretary may request the Attorney General to institute a civil action in a district court of the United States for any district in which the person if found, resides, or transacts business, to collect the penalty (plus interest at currently prevailing rates from the date of the final order or the date of the final judgment, as the case may be). The district court shall have jurisdiction to hear and decide any such action. In such action, the validity, amount, and appropriateness of such penalty shall not be subject to review. Any person who fails to pay on a timely basis the amount of an assessment of a civil penalty as described in the first sentence of this paragraph shall be required to pay, in addition to such amount and interest, attorneys fees and costs for collection proceedings.

(c) *Hearings-* Hearings held during proceedings instituted under subsection (a) shall be conducted in accordance with section 554 of title 5, United States Code.

(d) *Use of Recovered Amounts-* Penalties collected under this section shall be available to the Secretary and without further appropriation may be used only as follows:

(1) To protect, restore, or repair the paleontological resources and sites which were the subject of the action, and to protect, monitor, and study the resources and sites.

(2) To provide educational materials to the public about paleontological resources and sites.

(3) To provide for the payment of rewards as provided in section 6308.

SEC. 6308. REWARDS AND FORFEITURE.

(a) *Rewards-* The Secretary may pay from penalties collected under section 6306 or 6307 or from appropriated funds--

(1) consistent with amounts established in regulations by the Secretary; or

(2) if no such regulation exists, an amount up to 1/2 of the penalties, to any person who furnishes information which leads to the finding of a civil violation, or the conviction of criminal violation, with respect to which the penalty was paid. If several persons provided the information, the amount shall be divided

among the persons. No officer or employee of the United States or of any State or local government who furnishes information or renders service in the performance of his official duties shall be eligible for payment under this subsection.

(b) Forfeiture- All paleontological resources with respect to which a violation under section 6306 or 6307 occurred and which are in the possession of any person, shall be subject to civil forfeiture, or upon conviction, to criminal forfeiture.

(c) Transfer of Seized Resources- The Secretary may transfer administration of seized paleontological resources to Federal or non-Federal educational institutions to be used for scientific or educational purposes.

SEC. 6309. CONFIDENTIALITY.

Information concerning the nature and specific location of a paleontological resource shall be exempt from disclosure under section 552 of title 5, United States Code, and any other law unless the Secretary determines that disclosure would--

- (1) further the purposes of this subtitle;*
- (2) not create risk of harm to or theft or destruction of the resource or the site containing the resource; and*
- (3) be in accordance with other applicable laws.*

SEC. 6310. REGULATIONS.

As soon as practical after the date of enactment of this Act, the Secretary shall issue such regulations as are appropriate to carry out this subtitle, providing opportunities for public notice and comment.

SEC. 6311. SAVINGS PROVISIONS.

Nothing in this subtitle shall be construed to--

- (1) invalidate, modify, or impose any additional restrictions or permitting requirements on any activities permitted at any time under the general mining laws, the mineral or geothermal leasing laws, laws providing for minerals materials disposal, or laws providing for the management or regulation of the activities authorized by the aforementioned laws including but not limited to the Federal Land Policy Management Act (43 U.S.C. 1701-1784), Public Law 94-429 (commonly known as the `Mining in the Parks Act') (16 U.S.C. 1901 et seq.), the Surface Mining Control and Reclamation Act of 1977 (30 U.S.C. 1201-1358), and the Organic Administration Act (16 U.S.C. 478, 482, 551);*
- (2) invalidate, modify, or impose any additional restrictions or permitting requirements on any activities permitted at any time under existing laws and authorities relating to reclamation and multiple uses of Federal land;*
- (3) apply to, or require a permit for, casual collecting of a rock, mineral, or invertebrate or plant fossil that is not protected under this subtitle;*
- (4) affect any land other than Federal land or affect the lawful recovery, collection, or sale of paleontological resources from land other than Federal land;*
- (5) alter or diminish the authority of a Federal agency under any other law to provide protection for paleontological resources on Federal land in addition to the protection provided under this subtitle; or*
- (6) create any right, privilege, benefit, or entitlement for any person who is not an officer or employee of the United States acting in that capacity. No person who is not an officer or employee of the United States acting in that capacity shall have standing to file any civil action in a court of the United States to enforce any provision or amendment made by this subtitle*

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