

**HERITAGE GREENS
COMMUNITY DEVELOPMENT DISTRICT
ENGINEER'S REPORT**

Prepared for

**BOARD OF SUPERVISORS OF
HERITAGE GREENS COMMUNITY DEVELOPMENT DISTRICT**

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October 1996

EXHIBIT A

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**HERITAGE GREENS
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1.0 INTRODUCTION

Heritage Greens is a 252 acre planned residential and golf course community development located approximately 2 miles east of Interstate Highway 75, on the south side of County Road 846, (Immokalee Road), in Collier County, Florida. The configuration of the community is shown in Exhibit 1. The purpose of this report is to describe the Heritage Greens Community Development District, and the land uses regarding the proposed, required capital improvements and timing thereof, apportionment of the costs for capital improvements, the recommended financing scenario, and preliminary assessment roll.

The Heritage Greens Community Development District was established on July 20, 1993 by the Collier County Board of Commissioners, pursuant to Chapter 190, Florida Statutes for the purpose of providing an alternative method of managing and financing basic services for the community development. The Heritage Greens Community Development District will give the property owners an efficient mechanism to:

1. To assure the delivery of basic community services at sustained levels of high quality over the long term;
2. Use less expensive front end capital to finance the installation of infrastructure,
3. To economically pay for the operation and maintenance of infrastructure and services.

Therefore, landowners residents within the Heritage Greens Community Development District may typically experience lower unit assessment cost for capital infrastructure and the delivery of basic services and potentially lower administrative costs as a result of a localized single purpose government. Itemized below are the systems facilities and services which are contemplated for financing by the Heritage Greens Community Development District.

2.0 DISTRICT BOUNDARY AND PROPERTIES SERVED

The District is bounded on the north by Immokalee Road, (County Road 846), by the Laurel Oaks Elementary School, and Gulf Coast High School which is currently under construction; on the east by the proposed extension of Logan Boulevard, on the south and on the west by agricultural lands. Table 1 indicates the land uses and acreage proposed within the District boundaries.

3.0 PROJECT DESCRIPTION

The existing site is currently a partially developed area; the undeveloped portion exhibits elevations of approximately 13.0 feet NGVD. Heritage Greens has its entry from Immokalee Road (County Road 846.) A network of private roadways will be constructed within the development, please refer to Exhibit #1 for the proposed road layout.

The water management system for Heritage Greens has been designed to operate through a series of inlets which collect storm water which has fallen over the roads, residential lots and recreational golf course. This is achieved by conveying the storm water below ground through a network of reinforced concrete pipes that discharge to the lakes strategically located throughout the golf course. These lakes are interconnected with pipes such that their elevations are equalized. The lakes provide the necessary storage and water quality treatment as required by South Florida Water Management District and Collier County. After being retained and treated in the lakes, the storm water is then discharged at a controlled rate off-site to the South Florida Water Management District canal on the north side of Immokalee Road. In the future this drainage will be discharged to the south per modifications anticipated in the Basin Master Drainage Plan.

Sanitary sewage is collected by a gravity system made up of PVC pipes and manholes which are under the roads. The sewage flows by gravity to one of four pump stations located throughout the development. Three of these stations pump the sewage by pressurized PVC transmission mains to a master pump station, which then pumps off-site to a Collier County sanitary sewage transmission main along the south side of Immokalee Road.

The water distribution system is fed from a transmission main along the north side of Immokalee Road. Potable water services is provided to the area through a network of 6", 8" 10" and 12" PVC pipes installed within the right-of-ways of the development.

4.0 COMMUNITY DEVELOPMENT DISTRICT IMPROVEMENTS AND ASSOCIATED CONSTRUCTION COSTS

Facilities, the construction maintenance and operation of which are to be financed by the District may include:

1. Construction of on-site sanitary sewage collection and transmission system.
2. Construction of on-site potable water distribution system, stormwater management system including collection facilities, and lakes for storage and water quality, internal roadways including paving, grading, street lighting, sidewalks, etc.
3. Landscaping within road right-of-ways, at project entry and on project perimeter.

Elements, which will be constructed by the District, but may be maintained and operated by others will include:

1. Sanitary sewage collection and transmission system, which will be dedicated to Collier County Water and Sewer District.
2. Potable water distribution system, which will be dedicated to Collier County Water and Sewer District.




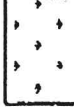
5.0 PROPOSED ASSESSMENT

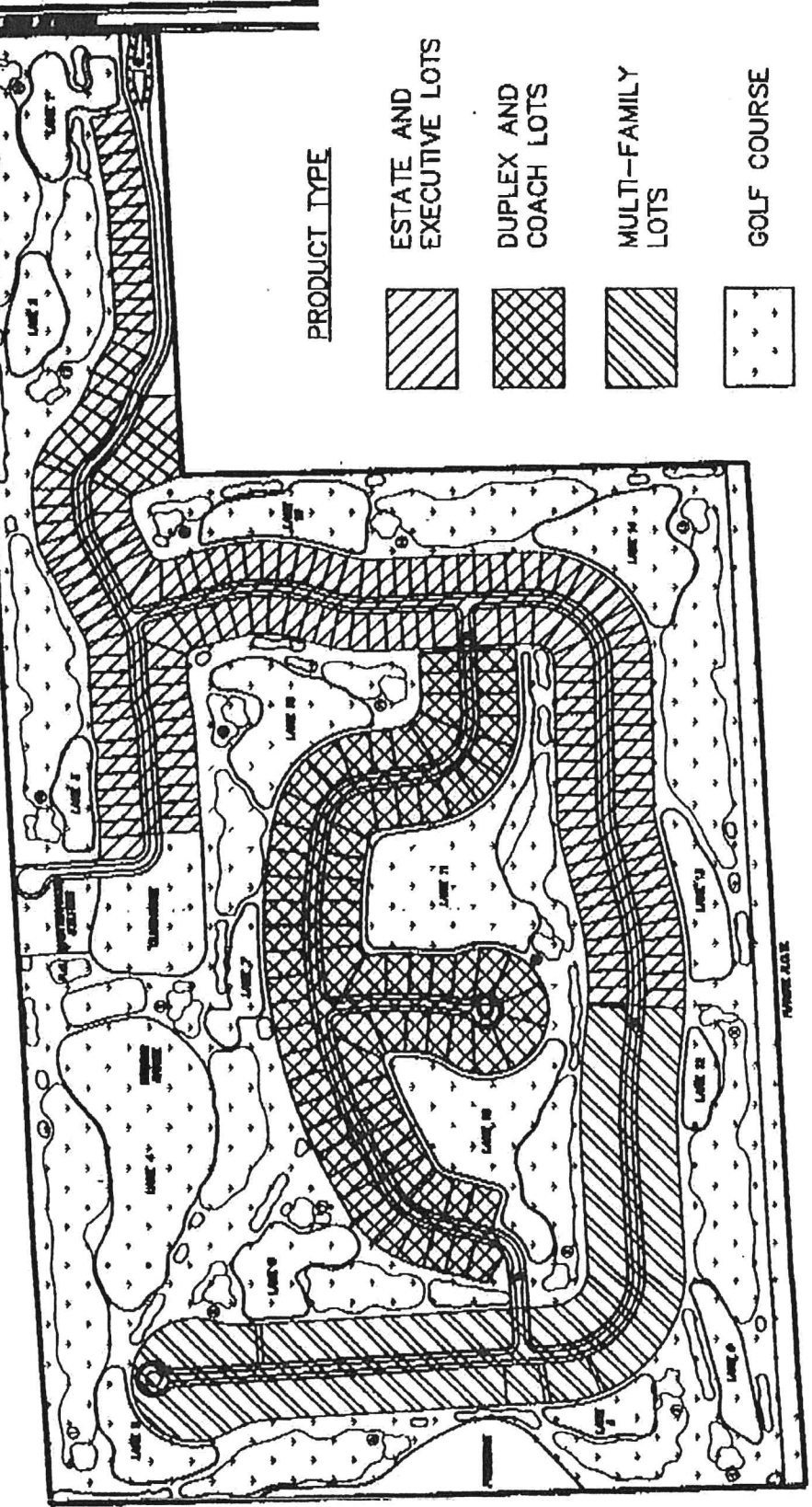
5.1 Capital Project Summary

A list of the proposed Heritage Greens Community District Capital Projects and the construction costs associated therewith is indicated in Tables 2 and 3. The total cost for the delivery of the infrastructure by the District to the Community Development, including financing costs is summarized in Appendix A *"Preliminary Assessment Methodology & Allocation for Heritage Greens Community Development District"* prepared by Fishkind & Associates, Inc. Each of these systems, facilities and services falls under the category of allowable and authorized District activities as defined in Section 190, Florida Statutes and costs associated with each is reasonable.



PRODUCT TYPE

	ESTATE AND EXECUTIVE LOTS
	DUPLEX AND COACH LOTS
	MULTI-FAMILY LOTS
	GOLF COURSE



FOR: HERITAGE GREENS

TITLE: SITE PLAN EXHIBIT 1

ACROLL
BARBER &
BRUNDAGE, INC.
 Professional engineers, planners, & land surveyors
 Main Office: 10000 Turnpike Blvd. N., Naples, FL 34108 (813) 987-8111
 Lee County Office: College Park, Suite 204, Ft. Myers, FL 33903 (813) 982-8111
 Fax: (813) 987-8111

DESIGNED BY: JWM	DATE: 05/16/1998	APP. PROJECT NO.	7208
DRAWN BY: JWM	DATE:	SHEET NO.	1 OF 1
CHECKED BY: JWM	DATE:	FILE NO.	8803
SCALE: NTS	ACAD DWG: 8803-EXT	PLOT WEN:	

TABLE 1
PROPERTY SUMMARY

<u>PROPERTY DESCRIPTION</u>	<u>QUANTITY</u>	<u>ACREAGE</u>
Estate Lots	27	6
Executive Lots	136	25
Duplex Lots	53	18
Coach Lots	20	6
Multi-family Lots	180	17
Golf Course Tracts	---	145
Open Space Tracts	---	1
Road Right-of-ways	---	25
Preserve	---	9
TOTAL:		252 Acres

TABLE 2
SUMMARY OF DISTRICT FACILITIES AND COSTS

<u>FACILITY DESCRIPTION</u>	<u>COST</u>
Roads	\$1,480,510
Other	\$2,926,990
TOTAL:	\$4,407,500

Heritage Greens Subdivision
 Agnoli, Barber & Brundage Inc.
 November 8th, 1996

TABLE 3

DISTRICT FACILITIES AND PRELIMINARY OPINION OF PROBABLE COST DISTRIBUTION

	RESIDENTIAL	ROADS	OTHER
Water	\$334,682		\$334,682
Sanitary System	\$693,476		\$693,476
Drainage	\$438,773		\$438,773
Water mgmnt. exc. fill to roads	\$112,705	\$112,705	
Water mgmnt. exc. fill to lots	\$410,158		\$410,158
Water mgmnt. exc. fill to pads	\$363,852		\$363,852
Paving & Roadway	\$913,088	\$913,088	
Street Lights	\$60,100	\$60,100	
Front Entry Statement	\$30,000		\$30,000
Contingency	\$100,000	\$50,000	\$50,000
Landscaping	\$300,000	\$300,000	
SUB-TOTAL	\$3,756,833		
PERMITS, CONST. MANAGEMENT AND ENGINEERING FEES			
Permit fees	\$3,488	\$1,733	\$1,733
Construction Plans	\$59,346	\$19,584	\$39,762
Permitting	\$35,000	\$11,550	\$23,450
Certification	\$45,000		\$45,000
Utility Turnover	\$5,000		\$5,000
Florida Power and Light	\$332,000		\$332,000
Sprint United Telephone of Florida	\$53,355		\$53,355
Const. Observation	\$117,500	\$11,750	\$105,750
SUB-TOTAL	\$650,667		
TOTALS	\$4,407,500	\$1,480,510	\$2,926,990

METHODOLOGY FOR ALLOCATION OF EARTH FILL MATERIAL

In order to satisfy requirements for water management in the Heritage Greens Community the placement of earth fill will be needed to elevate the land from the existing elevation to meet design grades. Fill will be placed both within the golf course as well as within the residential area. The design requirements of the golf course will necessitate the placement of approximately 350,000 cubic yards of earth fill material. Within the residential areas, fill will be required within the roadway areas in order to meet regulatory and design requirements. Fill material will be required within the development lots in order to promote drainage until such time as homes are constructed.

While this fill material could be from an offsite source, to import the fill needed would be significantly more costly than to excavate lakes onsite. In addition, onsite lakes will also serve as water management facilities and create an amenity for the golf course and the community as a whole. It is the intent to construct the lakes to the design depth.

A combination of Special Assessment Revenue Bonds and private funding sources will be used to fund the excavation of the lakes to produce the fill required in order to bring the golf course to design grade elevation. Special Assessment Revenue Bonds will fund the residential infrastructure serving the community. The fill generated by the lake excavation will be utilized to fill golf course and the road right-of-ways, that material remaining will be used to fill the development lots.

**METHODOLOGY FOR ALLOCATION OF
THE COST OF THE STORM DRAINAGE COLLECTION SYSTEM**

The Heritage Greens drainage collection system consists of a series of storm inlets, and concrete storm culverts wherein water is routed to lakes which are within the golf course. These lakes have been interconnected by culverts which allow for equalization and conveyance of the storm water towards its ultimate discharge offsite. The costs associated with these facilities have been split between the golf course and the residential components of the community. the drainage was divided into three categories:

THE RESIDENTIAL CATEGORY - The portion of the drainage system consists of facilities which provide the infrastructure specifically to drain the roads within the community only. The cost of these facilities should be born by the residential component only.

THE GOLF COURSE CATEGORY - This is the portion of the drainage facilities which were designed solely due to the existence of the golf course. These are typically the culverts (as well as structures and headwalls) which serve to interconnect the lakes. The reasoning being that if not for the golf course, these interconnections could have been by open swales. Therefore, we felt the total costs of these facilities should be allocated to the golf course component.

THE SHARED CATEGORY - The facilities which would fall into this category would primarily be those drainage structures and culverts which serve to drain the back yards of the residential areas but will also serve to drain on the golf course. The cost of facilities within this category have been split between the golf course and the residential components equally.

Attached is an Exhibit drawing which schematically identifies the drainage facilities to be in each of the three aforementioned categories.

**STATUS OF APPROVALS
AND PERMITS**

HERITAGE GREENS

APPROVALS AND PERMITS FOR HERITAGE GREENS

1. The Planned Unit Development, P.U.D. Ordinance 86-9(1)
2. P.U.D. Site Plan approval
3. Florida Department of Environmental Protection Wastewater and Potable Water Permits
4. Vegetation Removal Permit
5. Collier County Right-of-Way Permit
6. Florida Department of Environmental Protection Wastewater and Potable Water Permits
7. Temporary Use Permit for Sales Trailer
8. Development Costs Budgets
9. Exhibit "A-1" - Heritage Greens Legal Description
10. SFWMD Permit regarding Heritage Greens Surface Water
11. SFWMD Permit regarding Heritage Greens Water Use
12. SFWMD Right-of-Way Permit
13. SFWMD Notice of Intent to Conduct Pre-Permit Work

PLANNED UNIT DEVELOPMENT, P.U.D. ORDINANCE 86-62

An Ordinance amending Ordinance 82-2 was modified to Ordinance 96-55, The Comprehensive Zoning Regulations for the unincorporated area of Collier County, Florida. The PUD as an instrument governs project development, land use summary, density, single-family and multi-family residential development, maximum units, building setbacks, height restrictions, business development, golf course development, parks and recreation development, utility development, development standards, stipulations and commitments, P.U.D. Master Development Plan, location map, and legal description. It also speaks on environmental considerations, water management, traffic, utilities and engineering considerations, plan approval requirements, signage, site planning, development standards, subdivision regulations, environmental and archeological stipulations and commitments.

This document is quite comprehensive and should be reviewed carefully as it is administered by Collier County and the development aspects are tailored by the P.U.D.

Date of Execution: September 25, 1986

Term: Life of Project

PLAT OF HERITAGE GREENS SUBDIVISION

On September 30, 1996, Agnoli, Barber & Brundage, Inc. (ABB) submitted the following to Collier County Project Review Services for an unsubstantial change review and approval.

1. Development Plans by Agnoli, Barber & Brundage, No. 5714, sheets 1-26 inclusive;
2. Plat of Dove Pointe Subdivision, No. 5783, sheets 1-17 inclusive;

Collier County will not issue a building permit until all utilities, roadway and bridge are completed and accepted by Collier County or the subject improvements are bonded or secured by a Letter of Credit. Upon completion of these improvements or bonding, the Plat can be recorded and building permits issued.

FLORIDA DEPARTMENT OF ENVIRONMENTAL PROTECTION WASTEWATER AND WATER PERMITS

The Florida Department of Environmental Protection Permits for Wastewater and Potable Water are being reviewed with our development plan at Collier County Project Review Services. The permits will allow the servicing of the project with wastewater collection and transmission and potable water service.

FDEP Wastewater Permit _____

Issued: _____

Term: Life of Project

FDEP Water Permit: _____
Issued: _____
Term: Life of Project

VEGETATION REMOVAL PERMIT

We have submitted to Collier County Project Review Services a Vegetation Removal Permit which will allow the developer to clear based on the Development Plans for the Sales Area. Plans for right-of-way Tree Clearing Permit were prepared by Agnoli, Barber & Brundage, Drawing No. 4147, sheets 1-11, dated July 1993. This work has been completed.

Issued: November 4, 1993
Term: 180 days

COLLIER COUNTY RIGHT-OF-WAY PERMIT

ABB has applied for and received permits for work within the Collier County Right-of-Way Permit No. 8879C is for the Utility Connections and Permit No. 8803C is for a driveway connection. This work has been completed.

FLORIDA DEPARTMENT OF ENVIRONMENTAL PROTECTION WASTEWATER AND WATER PERMITS

These have been applied for to complete connections only within the Collier County Right-of-Way. This work has been completed.

FDEP Wastewater Permit: CS11-234836
Issued: July 27, 1993
Term: Life of Project

FDEP Water Permit: DS 11-234842
Issued: August 3, 1993
Term: Life of Project

DEVELOPMENT COSTS BUDGET

These are the proposed development budgets based on design plans provided by Agnoli, Barber & Brundage for roadway and infrastructure design.

EXHIBIT "A-1" HERITAGE GREENS LEGAL DESCRIPTION

This is the legal description that is reflected on the Plat f(or Heritage Greens), which constitutes the total land area for the project.

SOUTH FLORIDA WATER MANAGEMENT DISTRICT (SFWMD) SURFACE WATER PERMIT FOR SERVING 252.3 ACRES OF RESIDENTIAL LANDS

SFWMD Permit No. 11-00718-S for Heritage Greens construction and operation of a water management system serving 252.3 acres of residential and golf course lands. A modification will be appropriate when drainage discharge outfall moves to southeast property.

Issued: (expected) August 12, 1993
Term: Life of Project

SOUTH FLORIDA WATER MANAGEMENT DISTRICT (SFWMD) WATER USE PERMIT FOR SERVING 252.3 ACRES OF RESIDENTIAL LANDS

SFWMD Permit No. 11-00718-W for Heritage Greens irrigation golf course of 83.36 acres. Withdrawals are via two proposed withdrawal facilities and from on-site lakes via three proposed withdrawal facilities. A new Water Use Permit has been applied for and approval is anticipated shortly.

Issued: (expected) August 12, 1993
Expiration Date: December 15, 1995

SOUTH FLORIDA WATER MANAGEMENT DISTRICT (SFWMD) RIGHT-OF-WAY PERMIT
SFWMD Permit No. 994 for Heritage Greens Connection within District Right-of-Way. This work has been completed.

Issued: July 15, 1993
Expiration Date: July 31, 1994

"EXHIBIT G-1"

APPROVALS AND PERMITS FOR HERITAGE GREENS

The aforementioned permits and approvals comprises the total permits received to date needed to proceed with the development of the project. All of the permits and approvals have been reviewed by the staff of Collier County, Florida Department of Environmental Protection, and South Florida Water Management District, as indicated.

Heritage Greens Development Corporation worked closely with the members of the government and community to establish development standards that addressed all of the parties' concerns.