

**Lee County Board Of County Commissioners
Agenda Item Summary**

Blue Sheet No. 20030148

1. REQUESTED MOTION:

ACTION REQUESTED: Approve and authorize Chairman to execute the attached interlocal agreement between the Lee County and the City of Fort Myers.

WHY ACTION IS NECESSARY: The Board of County Commissioner must approve all agreements.

WHAT ACTION ACCOMPLISHES: Provides a mechanism for reimbursement of Tourist Development Council approved projects utilizing the TDC beach and shoreline funds.

2. DEPARTMENTAL CATEGORY:

COMMISSION DISTRICT #: 3

CIB

3. MEETING DATE:

02-25-2003

4. AGENDA:

- CONSENT
- ADMINISTRATIVE
- APPEALS
- PUBLIC
- WALK ON
- TIME REQUIRED:

5. REQUIREMENT/PURPOSE:
(Specify)

- STATUTE
- ORDINANCE
- ADMIN. CODE
- OTHER

6. REQUESTOR OF INFORMATION:

- A. COMMISSIONER
- B. DEPARTMENT Visitor & Conv. Bureau
- C. DIVISION
- BY: D.T. Mich, Executive Director

7. BACKGROUND:

The Tourist Development Council recommended tourist tax funding for one City of Fort Myers project for FY 2002-2003. The Board of County Commissioners approved funding this project with adoption of the FY 2002-03 / 2006-07 Capital Improvement Program. The attached interlocal agreement authorizes the City to perform the specified work and County staff to reimburse the City for expenses incurred. The project is as follows:

201892.....Historic Caloosahatchee Seawall at the Estates.....\$156,250.00

Funds are available in account number 20189330101.508309, Capital Projects, Caloosahatchee Seawall at the Estates, Capital Improvement Fund, Tourist Tax, Other Grants and Aids.

8. MANAGEMENT RECOMMENDATIONS:

9. RECOMMENDED APPROVAL:

A Department Director	B Purchasing or Contracts	C Human Resources	D Other	E County Attorney	F Budget Services	G County Manager								
<i>[Signature]</i> 2-4-03	<i>[Signature]</i>			<i>[Signature]</i> 2-13-03	<table border="1"> <tr> <td>OA</td> <td>OM</td> <td>Risk</td> <td>GC</td> </tr> <tr> <td><i>[Signature]</i> 2-13-03</td> <td><i>[Signature]</i> 2/13/03</td> <td><i>[Signature]</i> 2/13/03</td> <td><i>[Signature]</i> 2-13-03</td> </tr> </table>	OA	OM	Risk	GC	<i>[Signature]</i> 2-13-03	<i>[Signature]</i> 2/13/03	<i>[Signature]</i> 2/13/03	<i>[Signature]</i> 2-13-03	<i>[Signature]</i>
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10. COMMISSION ACTION:

- _____ APPROVED
- _____ DENIED
- _____ DEFERRED
- _____ OTHER

Rec. by CoAtty
Date: 2/12/03
Time: 2:15PM
Forwarded To:
Budget
2/12/03 2:20pm

RECEIVED BY
COUNTY ADMIN. *[Signature]*
2-12-03
3:00
COUNTY ADMIN
FORWARDED TO: *[Signature]*
2-13-03
3:10pm

AGREEMENT FOR TOURIST DEVELOPMENT TAX FUNDING

THIS AGREEMENT is entered into by and between LEE COUNTY, a political subdivision of the State of Florida, hereinafter referred to as the "COUNTY" and the City of Fort Myers, a municipality incorporated in the State of Florida, hereinafter referred to as "RECIPIENT", for funding provided by Lee County pursuant to its Tourist Development Plan.

WITNESSETH:

WHEREAS, pursuant to Florida Statutes §125.0104 and Lee County Ordinance No. 01-16, Lee County collects tourist development tax; and

WHEREAS, COUNTY and RECIPIENT acknowledges that the tourist development tax may only be spent in accordance with the Tourist Development Plan adopted by Lee County; and

WHEREAS, the COUNTY has approved the RECIPIENT'S request for funding under its Tourist Development Tax Plan for implementation of the following project:

NAME: Historic Caloosahatchee Seawall on the Estates

NUMBER: 201892

NOW, THEREFORE, THE PARTIES HERETO AGREE AS FOLLOWS:

1. The **RECIPIENT** will perform the work as outlined in the project description (Exhibit "A") and submit a detailed invoice to the **COUNTY**. The **COUNTY** will then reimburse the **RECIPIENT** for the amount not to exceed \$156,250.00 during the **COUNTY'S** fiscal year 2003.
2. Funding is solely limited to the project as described in the forms submitted by the **RECIPIENT** to the Tourist Development Council. **RECIPIENT** may not make any major alterations, changes or substitutions to the project description without obtaining prior approval from the Tourist Development Council and **COUNTY**. Minor changes, alterations and/or substitutions may be approved by the Director of the Visitor Convention Bureau or her designee.
3. This Agreement is subject to the **RECIPIENT** complying with the following Special Conditions: The **RECIPIENT** shall not submit an invoice to the **COUNTY**, and the **COUNTY** shall not reimburse the **RECIPIENT** for (1) the historical archeology faculty and related material for 3 months and (2) the indoor exhibit of engineering drawings/historical photos/singage included on the **RECIPIENT** Request Form (Exhibit "A"), as these expenditures were deemed ineligible.
4. **RECIPIENT** shall provide to **COUNTY** evidence of substantial activity within eighteen (18) months at the beginning of the fiscal year.
5. Unspent or unencumbered revenue remaining at the end of the fiscal year may be carried over into the next fiscal year, contingent upon approval of the

Board of County Commissioners.

6. Accurate records of all expenditures shall be maintained by the **RECIPIENT**, and these records shall be made available at all reasonable times for inspection, review or audit by the **COUNTY**. Records shall be kept for a period of at least three (3) years following the end of the funding period.
7. **RECIPIENT** will submit quarterly reports to the **COUNTY**. Expenditure reports must be accompanied by sufficient supporting invoices and documentation to support pre-audit and post-audit review. The sufficiency of said documentation shall be determined by the Clerk of the Circuit Court, who may seek additional information as the circumstances require.
8. The **COUNTY** shall not be liable to any person, firm or corporation that contracts with the **RECIPIENT** to provide goods and services associated with the project conducted with the funding. Nor shall the **COUNTY** be liable to any person, firm or corporation for claims against the **RECIPIENT** or debts incurred by the **RECIPIENT**.
9. The **RECIPIENT** shall reimburse the Lee County Tourist Development Tax Trust Fund for any sums adjudged by a court of competent jurisdiction to be an unauthorized expenditure.
10. The **RECIPIENT** covenants to the **COUNTY** that it has lawful authority to enter into this agreement and has authorized the execution of this agreement by its authorized representative.

11. This agreement may not be modified, amended or extended orally. This agreement may be amended only by written agreement executed by the governing bodies of both parties.

IN WITNESS WHEREOF, the parties hereto have caused this agreement to be executed by the undersigned officials, as duly authorized this ____ day of _____, 200__.

ATTEST:
CHARLIE GREEN, CLERK

BOARD OF COUNTY COMMISSIONERS
LEE COUNTY, FLORIDA

BY: _____
DEPUTY CLERK

BY: _____
CHAIRMAN

APPROVED AS TO FORM

BY: _____
COUNTY ATTORNEY'S OFFICE

ATTEST:
CITY CLERK

CITY OF FORT MYERS, FLORIDA

BY: Marie Adams
MARIE ADAMS, CMC

BY: Jim Humphrey
JIM HUMPHREY, MAYOR

APPROVED AS TO FORM

BY: [Signature]
CITY ATTORNEY'S OFFICE

EXHIBIT "A"

FM-2
Request Number
Official Use

**BEACH & SHORELINE PROJECT REQUEST FORM
FOR TOURIST DEVELOPMENT TAX -- BEACH & SHORELINE FUNDS
FISCAL YEAR 2002-2003**

REQUESTING AGENCY INFORMATION	
Requesting Agency: Edison & Ford Winter Estates	
Project Manager: Chris Tenne Pendleton Gen Mgr	Phone Number: 941.461.2685
E-mail address: cpendleton@cityftmyers.com	Fax Number: 941.461.2688

PROJECT INFORMATION	
Project Name: "Historic Caloosahatchee Seawall on the Estates"	
Check one: <input checked="" type="checkbox"/> Capital Project	<input type="checkbox"/> Maintenance Project
For capital projects please provide:	
Anticipated Start Date: October 1, 2002	
Anticipated Completion Date: March 31, 2003	

REQUEST			
FY 02-03 TDC Beach & Shoreline Funds: \$171,250			
If this project will be phased over more than one fiscal year, please identify the anticipated additional expenditure requests for TDC funding by fiscal year below:			
FY 03-04	FY 04-05	FY 05-06	FY 06-07
\$	\$	\$	\$

If this project has received previous TDC funding, please list the fiscal year(s) and award amount(s) below:

We have not previously applied for funding for historic seawall reconstruction of the original Edison seawall. Our current request is the result of the recommendations of our consultant Rosenblum PA, the City Engineer for the City of Fort Myers, and the Building and Grounds Committee of the Estates.

BEACH & SHORELINE PROJECT REQUEST FORM FY 02-03
PAGE 2 OF 2

OTHER FUNDING SOURCES

Are funds other than Tourist Development Tax Beach & Shoreline Funds being requested for the construction or the maintenance of this project? yes
xx no

Please note this includes funds provided by your own agency, grants or revenues generated by the facility/activity

Has other funding already been approved? yes XX no

If, yes, please list the approved amount: \$

If other funding has not been approved, please list the amount you have requested and the anticipated approval date?

REQUEST NARRATIVE

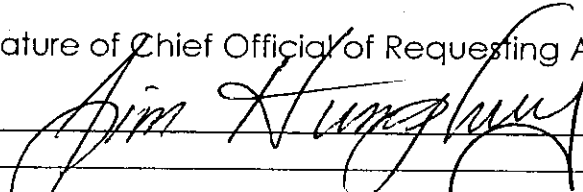
Please note: All information must be included for this request to be considered for funding.

I. Project Summary – one to two sentences

Project Abstract – (two pages maximum) to include:

- A. Project Description
 - B. Overall Context – if this request is part of a larger project, please describe the larger project and how this component is integrated
 - C. Impact on Tourism
 - D. Estimate Project Timeline – please include estimates for design, permitting and construction
- II. Maps – using the map provided, please mark the location of your site within the county and submit a site map indicating the project's relationship to the beach/shoreline
- III. Budget Information – (one page maximum) to include:
- A. Budget for Project – please provide a basic budget breakdown for the project
 - B. Facility Maintenance Budget – if this is a capital project, please provide (1) description of who will operate and maintain the facility, (2) the anticipated first full year of operating and maintenance costs, and (3) the source for these funds

Signature of Chief Official of Requesting Agency:



Date: Mar. 11, 2002

For additional information contact Tamara Rigott, Beach and Shoreline Project Manager for the Lee Island Coast Visitor & Convention Bureau, at (941) 338-3500 or trigott@leegov.com

I Project Summary

This proposal is to restore and reconstruct the historic, native limestone rock seawall that protects the Edison and Ford Estates from the Caloosahatchee tidal area. The goal of this project is to restore the seawall that has been eroded and displaced during the past 100 years, and as a result, to enhance the riverfront for enjoyment by the public and visitors to the Estates. Activities such as bird-watching, photography and art classes and general nature based walks will be greatly improved with the newly restored shoreline area.

II. Project Abstract

Project Description

The proposed project will extend 950 feet from just south of the dock/beach area on the Estates and include approximately 450 ft of the original Edison property and the same distance in front of the Ford (original Gilland) property.

Records indicate that a 3-foot high and 2 foot wide seawall was built beginning in 1903 and completed by 1907 by Charles Nickerson for Thomas A. Edison. In fact, Edison has been recorded to say that, *"inside of a few years this section will not be large enough to hold that tourists that will be scrambling to get here every winter. Yes, sir, by all means build the sea wall."* This might be our earliest, accurate reflection of the importance of the riverfront to our visiting tourists.

As evidenced from the photographs attached, Edison evidently continued to acknowledge the importance of the seawall and enjoyed walking the riverside and sitting and enjoying the river views. We want that experience to continue for our visitors and to return the seawall area to its original historic intent.

The original plans were to stabilize the earthen embankment that most likely existed when the seawall was constructed in 1903, sod the area, and add the native stone rock wall. Since initial completion little has been done to attend to the needs of the original seawall structure although maintenance over the years has included some addition of non-consistent rip-rap and backfill materials to maintain the seawall as needed.

With the completion of our two-year Cultural Landscape Report, the hiring of a professional museum director, and the activation of our first Building and Grounds Committee of the Board, we feel that we have the documentation and the additional oversight to accomplish this critical component of the Estates.

Prior and during this proposed project, we will display an exhibit on the components of the project and include it in our tour and program description. At the conclusion of the project, we will install outdoor signage on the walk overlooking the seawall that describes the project, funding sources and relationship of the seawall to the overall site. We will also include faculty and students from the University in historic archeology research as we prepare the site for work (in the event that evidence may be found of early engineering and tools and equipment).

B. Overall Context

This project is a separate component of a larger independent project being undertaken by the City of Fort Myers to complete the installation and restoration of rip-rap seawalls to the City's riverfront enhancing existing vertical seawalls and rip-rap to form a uniform system of shoreline habitat and enhance the experience for boaters,

fishermen and visitors. It is important that the Estates complete our sea wall restoration at this time to be part of the overall riverfront system and also to respond to the direction of our consultants.

This project is also part of an overall goal of the Estates to repair and maintain the historic level of the Estates while adding to the visitor experience. By repairing the seawall, we will be able to actively include this area in our tour experience thus showing the visitor the importance of the river to life in Fort Myers during Edison's era and today.

C. Impact on Tourism

As a result of this project, we will not only restore the historic nature of the seawall, protect the shoreline of our historic site, provide new habitat for aquatic and land animals, but also be able to incorporate the shoreline experience as a part of our tour and program offerings to three hundred thousand visitors annually.

Work is already underway restoring the plant and other landscape features of the shoreline to the more open vistas and park like design elements that were part of Edison's original plans for usage of the land.

We want to attract more visitors to the Estates with the understanding that the Estates are a riverfront experience as well as historic home sites and botanical gardens. Completion of the restoration of the seawall will enable us to do this.

D. Estimated Project Timeline:

October 1, 2002 – March 31, 2003 – Overall project including interior exhibit describing the project, design and permitting, University-based historical archeology project, construction and installation of sea wall, shoreline bench system and signage.

October 1, 2002

October-December 2002

January – March, 31, 2003

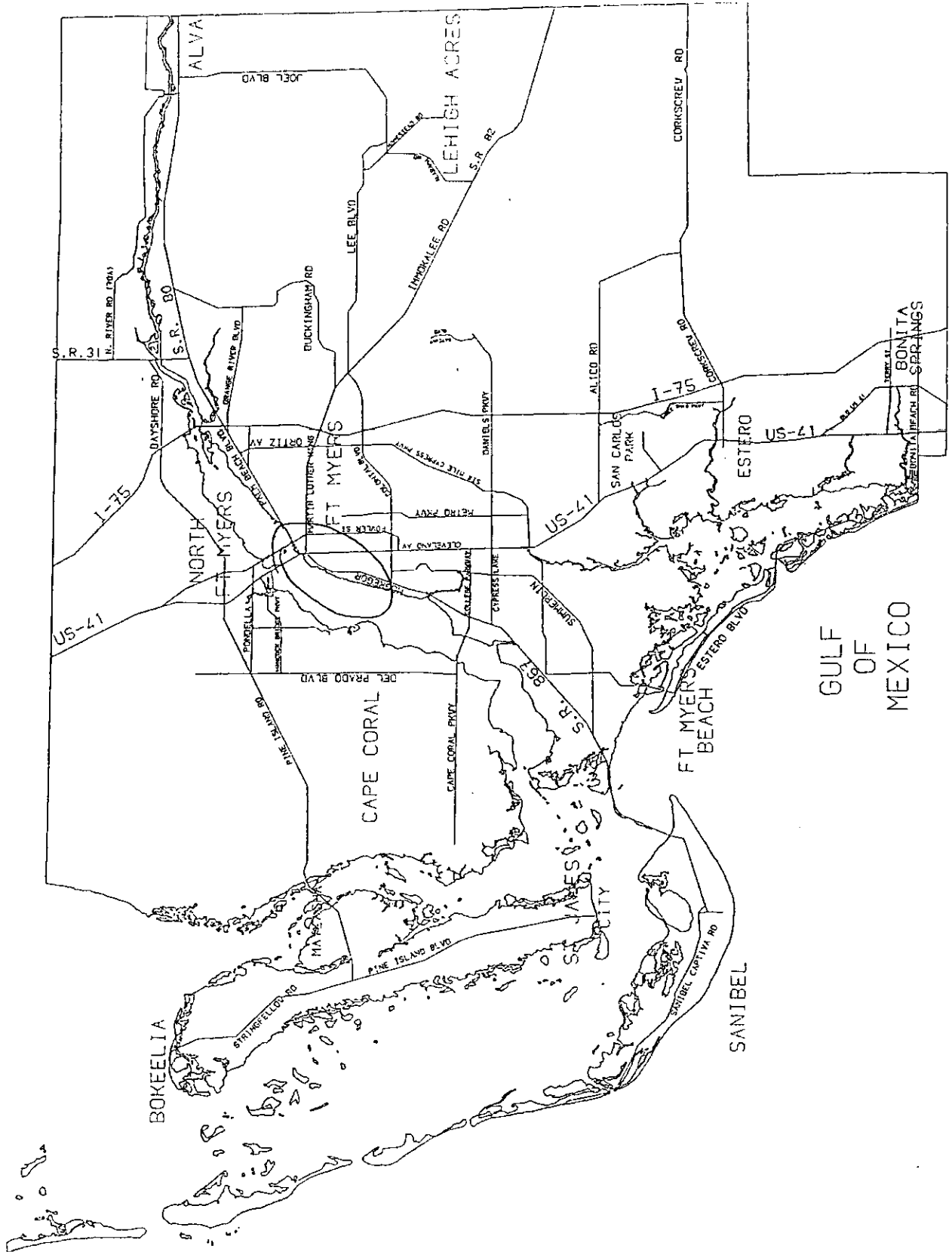
Design and Permitting

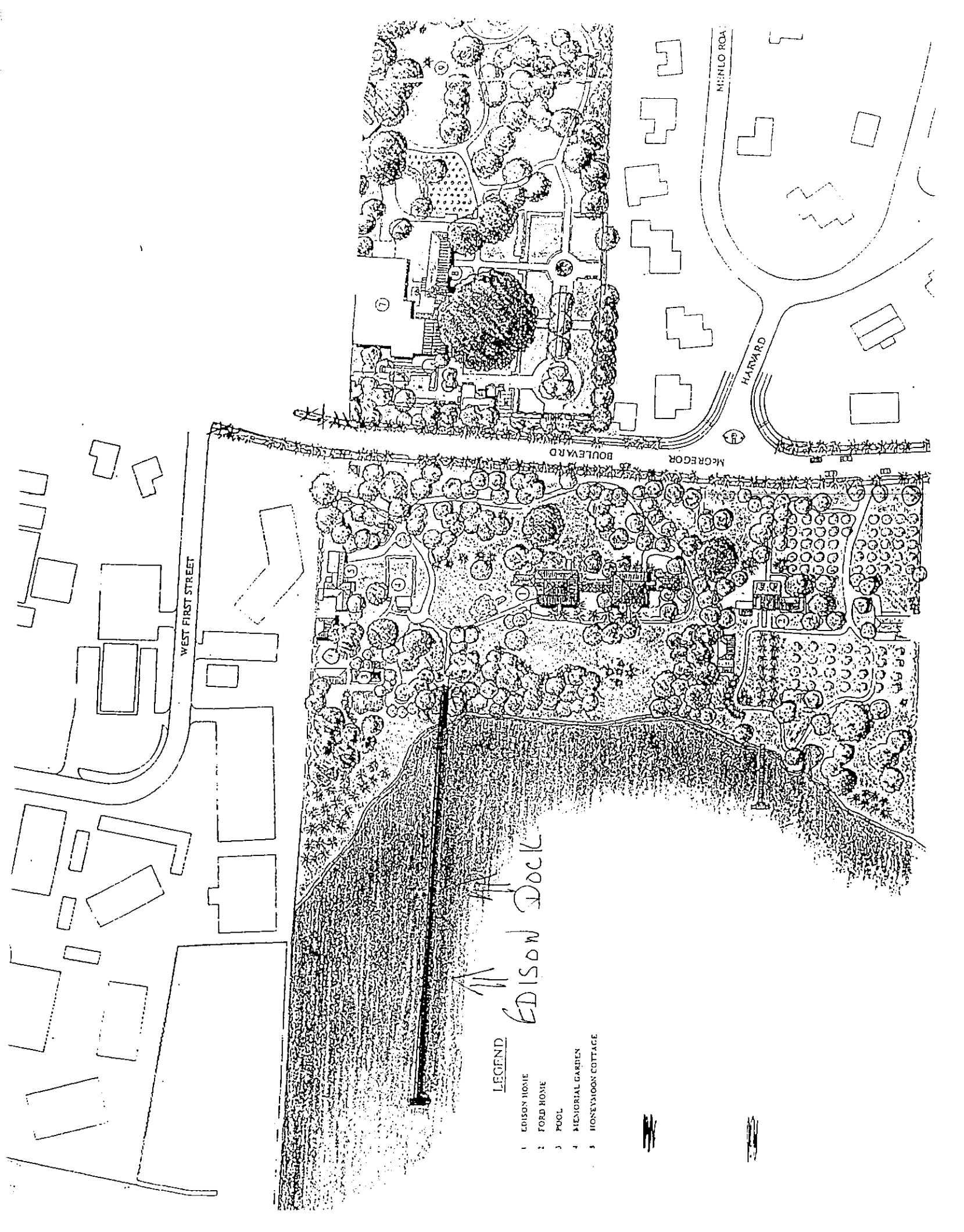
University-based historical archeology

Construction, Completion and Evaluation

Installation of Benches, Signage

III. Maps





LEGEND

- 1 EDISON HOME
- 2 FORD HOME
- 3 POOL
- 4 MEMORIAL GARDEN
- 5 HONEYMOON COTTAGE

EDISON DOCK

WEST FIRST STREET

MCGREGOR BOULEVARD

HARVARD

MENLO ROAD

IV. Budget Information:

A. Project Budget

Historical Archeology Faculty and related materials for 3 months	\$12,000
Indoor exhibit of engineering drawings, historical photos, signage	\$ 3,000
Preservation Architect and Consulting Engineer for the Construction Design, Supervision and Evaluation	\$12,500
Permits/Fees	1,000
Construction for 950 feet of shoreline @\$135 plf to remove concrete rubble and non historic plant material install waterproofing to landward side of wall replace modern masonry, infill with oolitic limestone, and repoint entire wall	\$128,250
5 benches as reproductions of Edison original bench	12,500
Seawall project signage	2,000
	<u>Project total</u> \$171,250

B. Facility Maintenance Budget

Chris Tenne Pendleton -General Manager
Rob Solomon -Buildings Manager
Bob McGuire- -Grounds Manager

Bob Sanford, Board Buildings & Grounds Co-Chair (Architect)
David Jones, Board Building & Grounds Co-Chair (Landscape Architect)

Saeed Kazemi, City of Fort Myers, Chief Engineer (Civil Engineer, PE)

The source for operating funds of the Edison & Ford Winter Estates is generated revenues and grants as outlined on the following pages from the approved budget of the City of Fort Myers.

Additionally, the Estates has received notice that it will be receiving grant funds from the Florida Trust for Historic Preservation as well as a capital loan for the repair of the historic building structures.

Please see attached pages for budget detail.

Edison/Ford Estates Fund 405

Chris Tenne Pendleton, Interim Manager

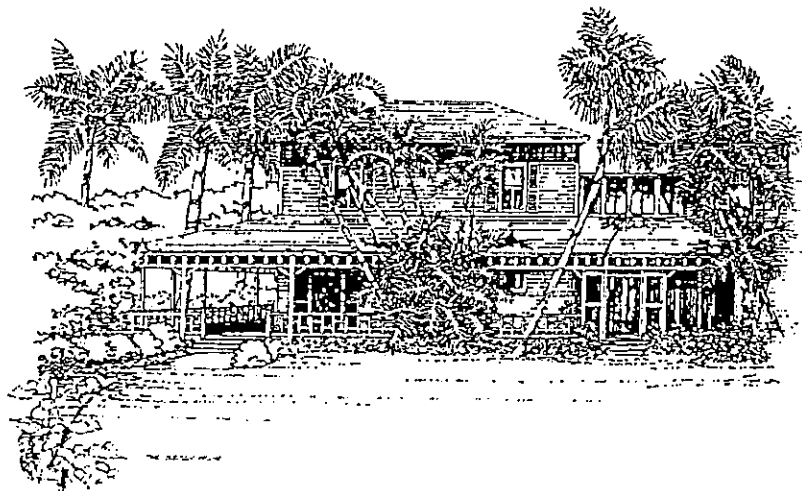
Program

Program

The Edison-Ford Winter Estates is a cultural, educational and environmental resource that preserves and draws upon the experiences and relationships of Thomas Alva Edison and Henry Ford to inspire people to create a better future.

Mission Statement

Preserve and interpret the home, botanical gardens, and laboratory of Thomas Edison as well as the home of Henry Ford. Further, the institution should collect, preserve, and exhibit artifacts relating to their lives and work, with special emphasis on their experiences in the City of Fort Myers. This endeavor is undertaken for the education and benefit of the public.



Edison Home

Goals and Performance Perspective

The Estates continue to perform well as a tourist attraction and maintain a steady revenue stream with an annual attendance of more than 300,000 visitors. The Lee County Visitor and Convention Bureau continues to be our source of advertising and marketing outside of the area by including us in their marketing materials, as well as providing grant funds. We continue to be in line with the attendance trends of other sites in the State. Our goal is to capture more of the local Lee County market. We are using existing staff to make individual sales calls to beach properties, etc.

This is an exciting time for the Estates as there is Administrative and Community support for expansion. A Strategic Plan, funded by the Charles Edison Fund and Edison/Ford Winter Estates Foundation, will allow us to have specific direction for the next five years and beyond. It is our goal to develop a business plan that will better allow the City to evaluate the impact of the site.

Recent surveys show that the site continues to please providing an overall good visitor experience. The Electric Launches are not self-supportive yet, and statistics show that a more intensive marketing plan is needed. Elderhostel program, in cooperation with Barry University, continues to be a success. The Elderhostel directors have acknowledged our ability to be single host for this program in the future. Successful intern programs with Florida Gulf Coast University have strengthened our relationship with the University which is very important to our accreditation.

Edison/Ford Estates Fund 405

Program (continued)

The completion of the Cultural Landscape Report and Eco-tourism have placed the Botanical Gardens in a highly visible spot. Recent surveys showed the Gardens to be the number one segment in the view of the guests. We are raising the level of professionalism in the care of the Gardens through staffing and the use of consultants.

The Museum Store continues to show increases with the development of new products and a new botanical book which is well received. More floor space and storage is needed in this area.

Public/Private Partnership

Through the Edison/Ford Winter Estates Foundation, we receive support in many ways. They are co-sponsoring the Cultural Landscape Report, and have provided contacts with a consortium of local banks who plan to loan funds for the expansion program.

The partnership with the Fort Myers Woman's Club follows years of tradition by continuing to be very strong. Each year the Holiday House program is successful with increased visitation and extended dates. The additional work is absorbed by current staff.

The City's Grant/Contracts Division has provided many opportunities for outside funding, including the Save America's Treasures Grant for the Landscape study, Lee County Tourist Development monies for the boat dock at the Henry Ford Home and The State of Florida Historical Records Advisory Board for a historic collection information system. Current staff is self-trained to write grants and is showing successful returns.

The Estates continue to support the operating budget with ticket sales and Museum Store sales, which is unusual in the museum world. The time has come where it is imperative that we have outside funding sources for restoration and expansion. The Foundation is committed to the restoration of the historic building, but it takes time to raise the monies. Bank loans will fund the expansion of new administrative offices and a visitor services area. The Estates need the support of the City to keep the Homes in repair and the operation moving smoothly until the new plans come to fruition.



Ford Home

Edison/Ford Estates Fund 405

Fund Summary

	Actual 1999-00	Budget 2000-01	Forecast 2000-01	Budget 2001-02
Revenues				
Charges for services	3,431,172	3,726,885	3,401,131	3,515,608
Miscellaneous	132,147	147,356	117,086	131,479
Intergovernmental	17,619	39,840	39,840	37,441
	3,580,938	3,914,081	3,558,057	3,684,528
Expenditures				
Personal services	1,765,728	1,807,857	1,785,357	1,683,230
Operating expenses	1,351,364	1,465,691	1,409,577	1,499,732
Capital outlay	15,246	10,840	10,840	11,000
Debt & other	383,504	360,606	360,606	358,977
	3,515,842	3,644,994	3,566,380	3,552,939
Net income (loss) from operations	65,096	269,087	(8,323)	131,589
Transfers in (out)				
Operating	100,095	59,233	59,233	20,222
Operating	(165,042)	(180,420)	(178,320)	(60,000)
Total transfers	(64,947)	(121,187)	(119,087)	(39,778)
Net income (loss)	149	147,900	(127,410)	91,811
Prior year surplus, beginning of year	28,019	28,168	28,168	(99,242)
Audited (estimated) prior year surplus	28,168	176,068	(99,242)	(7,431)

Explanation

Modest increases in revenues are projected next fiscal year. It is expected to be a year of transition as the Estates begin to implement the findings as outlined in the historic structures report. The Estates also expect to have the Strategic Plan completed and approved by Council early this fiscal year. Both of these documents combined with the Cultural Landscape Report (which is expected to be finalized shortly) will aid the growth of the Estates in the establishment of "something new" to attract additional tourists and local Lee County residents as return visitors. The Estates will try to capture more of the local Lee County market next year as the overall outlook for tourism in Southwest Florida is a downward trend. To maintain existing attendance figures, aggressive marketing and introduction of new programs is a must.

Current year revenues are expected to be slightly below plan. Admissions are slightly below plan this year, which is consistent with attendance at other state-wide attractions. Charges for services are slightly below plan as a result of less revenue being generated from ticket sales for the Electric Launch boat rides. The Electric Launch boat rides did not reach the anticipated levels in this year and the revenue budget has been reduced next year to reflect this. The program will be re-evaluated during the current fiscal year. The current Director imposed strict expense savings measures to offset much of the generated revenue deficits.

Edison/Ford Winter Estates 405 - 1801

Chris Tenne Pendleton, Interim Manager

Program

Historic landmarks which provide exhibits, tours and information about the winter estates of Thomas Alva Edison and Henry Ford.

FY 01/02 Goals and Objectives

Goals: To continue the historic preservation of the Homes and Estates, implement the Cultural Landscape Report and to begin to move towards Museum accreditation.

- 1) Continue to implement recommendations made by the Historic Structures Report Team.
- 2) Expand public/private partnership working to raise funds for restoration/preservation projects.
- 3) Restore the present parking area to gardens.
- 4) Make changes in interpretation of the tour.
- 5) Implement recommendations from the five year strategic plan and make changes as directed by Museum Assessment Program.

Performance Measurements & Position Summary

	Actual FY 99/00	Forecast FY 00/01	Budget FY 01/02
Number of visitors including Holiday House	317,821	307,175	299,279
Comp tickets issued	0	18,000	20,000
Number of educational tours	506	498	518
% of historic preservation recommendations implemented	25%	25%	25%
Implementation of Cultural Landscape Report	N/A	N/A	15%
Full time equivalent positions	50.1	50.1	47.6

Appropriations

	Actual 1999-00	Budget 2000-01	Forecast 2000-01	Budget 2001-02	Increase (decrease) both \$ and %
Expenditures					
Personal services	1,325,329	1,371,795	1,351,795	1,246,832	(124,963) -9.11%
Operating expenses	872,616	882,424	850,891	908,163	25,739 2.92%
Capital outlay	15,246	4,840	4,840	11,000	6,160 127.27%
Transfers	165,042	180,420	178,320	60,000	(120,420) -66.74%
Debt & other	383,504	360,606	360,606	358,977	(1,629) -0.45%
Total	2,761,737	2,800,085	2,746,452	2,584,972	(215,113) -8%

Explanation

Personal services -- net effect of (1) three positions being eliminated and one position frozen for FY 01-02; (2) estimated 13% increase in health premiums; (3) minimal increase in retirement costs; (4) approved 30.3% increase in cafeteria benefits; and (5) approved salary increases.

Operating expenses -- net effect of (1) increasing professional services budget for increased marketing services which will be provided by the Visitors Convention Board to offset the freezing of the Marketing and Public Relations position in the current budget; (2) reduction in Fleet, Advertising Message Centers and Insurance fixed cost allocation; and (3) approved 3.2% cost of living increase.

Capital outlay -- See Capital Outlay Detail section of this book.

Transfers -- Reduction in transfer to the General Fund.

Grounds Maintenance 405 - 1809

Chris Tenne Pendleton, Interim Manager

Program

The Grounds Maintenance Division enhances the tour of the estates with continuous upkeep of trees, grounds, shrubs and flowers. A plant propagation program is in place which provides plants for seasonal sales.

FY 01/02 Goals and Objectives

<p>Goals: To improve overall quality of staff knowledge, continue preventative arboring program and provide documentation of all plants and trees at the Edison/Ford Winter Estates.</p>	<ol style="list-style-type: none"> 1) Training program and seminars for staff. 2) Continue to remove all trees where risk of strike to structure and/or visitors of facilities are great. 3) Continue to do research and provide documentation of all plants and trees at the Edison/Ford Winter Estates.
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Performance Measurements & Position Summary

	Actual FY 99/00	Forecast FY 00/01	Budget FY 01/02
Number of cross-trained employees	7	7	7
Number of trees removal	N/A	7	5
Research and documentation	0	75%	100%
Full time equivalent positions	8.0	8.0	8.0

Appropriations

	Actual 1999-00	Budget 2000-01	Forecast 2000-01	Budget 2001-02	Increase (decrease) both \$ and %
Expenditures					
Personal services	235,721	239,282	236,782	257,199	17,917 7.49%
Operating expenses	29,979	42,418	45,003	53,301	10,883 25.66%
Capital outlay	-	-	-	-	N/A
Transfers	-	-	-	-	N/A
Debt & other	-	-	-	-	N/A
Total	265,700	281,700	281,785	310,500	28,800 10%

Explanation

Personal services -- net effect of (1) estimated 13% increase in health premiums; (2) minimal increase in retirement costs; (3) annualization of tradesworker pay plan adjustments which were implemented in FY 00-01; (4) approved 30.3% increase in cafeteria benefits; and (5) approved salary increases.

Operating expenses -- net effect of (1) decreased Fleet equipment fixed cost allocation; (2) increased need for professional services for horticultural specialists; (3) increased need for repairs and maintenance and operating supplies; and (4) approved 3.2% cost of living increase.

Capital outlay -- N/A.

Museum Store 405 - 1816
Chris Tenne Pendleton, Interim Manager

Program

The Edison/Ford Museum Store represents a unique hybrid in the world of retail. The strategy of this store is to embrace the educational philosophy of the historic site by offering appropriate and mission related products.

FY 01/02 Goals and Objectives

<p>Goals: To provide quality service to guests of the estates through a courteous and knowledgeable staff and continue developing Edison and Ford merchandise to constantly improve the Store's financial ratios.</p>	<p>1) Increase number of transactions by reaching a larger market through a larger variety of Edison/Ford related merchandise. 2) Improve per capita purchase amounts as compared to fiscal year 99/00. 3) Improve our sales per square foot as compared to fiscal year 99/00. 4) Improve our gross profit ratios as compared to fiscal year 99/00.</p>
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Performance Measurements

	Actual FY 99/00	Forecast FY 00/01	Budget FY 01/02
Transactions/guest	27%	30%	27%
Per capita sales	\$ 2.84	\$ 2.85	\$ 2.90
Gross profit	50%	54%	54%
Annual sales per square foot	\$ 850.74	\$ 872.22	\$ 900.00
Full time equivalent positions	5.3	5.3	5.1

Appropriations

	Actual 1999-00	Budget 2000-01	Forecast 2000-01	Budget 2001-02	Increase (decrease) both \$ and %	
Expenditures						
Personal services	124,352	129,394	129,394	122,304	(7,090)	-5.48%
Operating expenses	427,600	513,175	485,709	510,702	24,993	4.87%
Capital outlay	-	-	-	-	-	N/A
Transfers	-	-	-	-	-	N/A
Debt & other	-	-	-	-	-	N/A
Total	551,952	642,569	615,103	633,006	17,903	2.79%

Explanation

Personal services -- net effect of (1) reclassifying one position from full-time to part-time; (2) estimated 13% increase in health premiums; and (3) minimal increase in retirement costs.

Operating expenses -- net effect of (1) replenishing funds to purchase store inventory which was cut back in FY 99/00 in order to reduce inventories on hand and (2) approved 3.2% cost of living increase.

Capital outlay -- N/A.

Electric Launches 405 - 1819
Chris Tenne Pendleton, Interim Manager

Program

The tours at the Edison/Ford Estates are enhanced by an electric launch ride. Four replicas of the launch used by Thomas Edison provide a 30 minute historical-ecological tour of the Caloosahatchee River. They are boarded at a temporary dock at the Royal Palm Yacht Club. Plans are in the works to rebuild the Ford Home dock for tours to originate there.

FY 01/02 Goals and Objectives

<p><u>Goals:</u> To provide quality historical cruises through well trained and courteous staff and provide entertaining and historical venue to area customers through private charter cruises.</p>	<p>1) Transport 13% of visiting public in electric launches. 2) Implement marketing plan for private charter business.</p>
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Performance Measurements & Position Summary

	Actual FY 99/00	Forecast FY 00/01	Budget FY 01/02
Percentage of visitors who ride electric launch	5%	13%	15%
Private charters	0	50	50
Full time equivalent positions	2.7	2.7	2.0

Appropriations

	Actual 1999-00	Budget 2000-01	Forecast 2000-01	Budget 2001-02	Increase (decrease) both \$ and %	
Expenditures						
Personal services	80,326	67,386	67,386	56,895	(10,491)	-15.57%
Operating expenses	21,169	27,674	27,974	27,566	(108)	-0.39%
Capital outlay	-	6,000	6,000	-	(6,000)	-100.00%
Transfers	-	-	-	-	-	N/A
Debt & other	-	-	-	-	-	N/A
Total	101,495	101,060	101,360	84,461	(16,599)	-16%

Explanation

Personal services -- effect of (1) elimination of one part-time position.

Operating expenses -- net effect of (1) minimal reductions in various operating expenses and (2) approved 3.2% cost of living increase.

Capital outlay -- N/A.

Boundaries are demarcation elements that divide the landscape. They can include a number of types of boundaries ranging from land use, vegetation, roadways, stone walls, and bodies of water or drainage ditches. Because of the overlapping subject areas, refer to other sections that constitute boundaries. These include the Caloosahatchee River and McGregor Boulevard in Circulation, trees in Vegetation, and ditches in Irrigation.

Other board fencing and arbor elements, the main topic of this boundary section, can be found in Water and Garden Structures in the Arbor, and Building Cluster portion of the report. Boundaries are often reinforced with other elements, especially planting. Edison notes in his 1886 site plan that boundary edges are to be planted with flowering and fruit trees, and over 40 years later, the Nolen office report notes that the boundaries need additional evergreen screening from Australian (*Casuarina spp.*) and Screw Pines (*Pandanus spp.*)¹⁶⁷

Caloosahatchee River Seawall and River Fence

Caloosahatchee River Seawall

Thomas A. Edison initially purchased a 13-acre lot in Fort Myers, including approximately 660' that fronted on the river. Edison's 1886 plan recommends planting sod to stabilize the earthen embankment (that most likely existed at the river's edge when the property was purchased), and whitewashing the stone/masonry edge. Records indicate that a 3-foot high and two-foot wide seawall existed in front of the Edison House by 1903, and that this was extended across the riverside of the Gilliland House the next year.¹⁶⁸ Work on the seawall must have continued, as Charles Nickerson continued to work on the seawall until 1907.¹⁶⁹

When asked his opinion on the "seawall proposition" Edison replied that he was in favor of it, and had "already had some talk with Gen. Terry on the subject...if you build this sea wall, inside of a few years this section will not be large enough to hold the tourists that will be scrambling to get here every winter. Yes, sir, by all means build the sea wall." The sea wall may not have been planned to go as far south as the Edison place, but Edison assured the reporter that "when that dredge gets here and gets to work

you will see a wall put in front of the Edison place, and no time will be lost in doing it either."

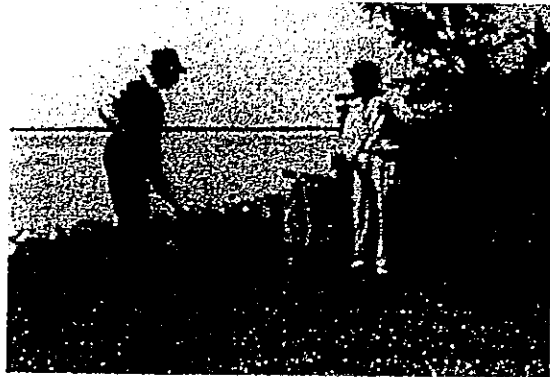


Figure 3.42. The raised seawall is clearly visible at the Caloosahatchee River edge in this 1934 image.¹⁷⁰



Figure 3.43 and 3.44. Above, historic view of seawall south of the Edison dock on the Edison site and a current view below.¹⁷¹



By 1910, the construction of the swimming pool necessitated work on the adjacent seawall.¹⁷² The 1910 W.R. Wallace bid correspondence references plans for the "bathing pool and appurtenances" received from Thomas Edison, upon which the estimate was based. The estimate provides a detailed description of the proposed project:

"Removal and straightening of old rubble stone [sea] wall, excavation for pool and placing material back of

wall."¹⁷³

The location chosen for the pool was on the bank of the Caloosahatchee River, at the northwest corner of the property. Because of its proximity to the sea wall, Wallace's proposal included "straightening the wall and filling behind for the space of about 65 ft. to 75 ft."¹⁷⁴ This location complicated the project, requiring two pool walls to be built below tide level. A hurricane washed away part of the wall and its backfilled portion at about this time, further causing complications.

In 1917, the seawall was the subject of much discussion when Kellow came to Fort Myers to evaluate the condition of the estate. He reported:

"The wall is at present built right up to the northern boundary of your property and runs out from shore at a right angle. At present also, the wall is of piling and is, therefore, somewhat unsightly. I understand, however, that the piling is merely temporary and that the concrete wall [to the north] will be extended to your property. The rocky shore as it exists at present is much more sightly than the concrete would be.

In the angle of the wall and shore at the edge of your property there is a backwater and a small accumulation of drift wood and a few 'deceased' fish...This backwater could be done away with by the construction of a curved sea wall of short length, extending from the wall at the point where construction has been stopped (i.e. at your boundary line) over to a point on shore at about the center of the swimming pool, thus giving movement to the water....In addition that the area around the wall which you would construct should be dredged somewhat, the material so gained to be filled in between the wall and the shore."¹⁷⁵

Although the Sanborn¹⁷⁶ site plans (1922-1948) all show that this suggested improvement seawall along the Edison property was not done, other documents refute this reality. A photograph of Thomas and Mina overlooking the new (lily) pond circa 1930 ("37399-31.tif") shows this filled area around the new pond in relation to the old and new seawalls, dock and Tea House. A 1925 site plan by Davidson,

Ranson and Burton, Inc., Civil Engineers also shows the altered shoreline (labeled loose rock wall) at this location.¹⁷⁷

After this time, the area from the swimming pool to the Yacht Club marina (north of the dock) was filled with additional river dredgings, leaving intact part of the earlier seawall, now inland. This infilling accommodated materials dredged from the river channel, presumably after 1961, as the filled area is not shown on a 1961 City of Fort Myers Edison site plan.¹⁷⁸

The seawall was noted as damaged by storms, notably the hurricane of 1944. Lewis Conant wrote to Mrs. Ford, "Your sea wall stood up but is badly washed out behind it. ...Mrs. Edison fared worse than you did, most of her wall is gone..."¹⁷⁹ Mina [Edison] was no stranger to seawall repairs, noting in 1933 in her maintenance notebook to "continue filling back of seawall." There is evidence of continued and more recent repairs to this area, including the timbers running alongside the earlier seawall near the pond.



Figure 3.45. The seawall continues to be rebuilt as needed, here surrounding a tree whose roots have been undercut and whose trunk now leans toward the river.¹⁸⁰

Current issues are delineated in the David Driapsa section of this report.



Figure 3.46. A break in the Edison site seawall has been here temporarily backfilled with concrete rubble.¹⁸¹

Caloosahatchee River Fence

In the early 1890s, it is known that there was a river wire fence that existed in the water far from the shoreline. However, the purpose and location of the fence is not fully known. From correspondence, the fence appears to have been installed to ward off refuse in the river and hyacinths (an invasive aquatic weed), and may therefore have been intended to create a clean area at the river edge for bathing. By 1906 it was in poor condition and needed to be replaced.¹⁸²

The river fence replacement was part of the 1907 project that extended the dock another 100 feet. Although Edison had discussed the project with Campbell in the spring of 1906, it was Stulpner who prepared the cost estimate. He expected that the dock and fence would cost in the neighborhood of \$1,000.

The plank river fence was to be supported on posts, the "same size and quality as for dock," spaced 8 feet apart. Between each post, six 2" x 6" planks of heart pine lumber would be mounted horizontally, with a 2" space between each. The planks would be fastened to the posts with galvanized bolts or spikes. The fence would be "run out from both sides of Edison property line parallel with nearest boathouse" [this implies that it was approximately 500 feet into the river from the Edison site land edge] and be "so arranged as to be below low tide and above high tide." The length of the fence was expected to be approximately 1400 feet, including that portion run out along the recently acquired Travers property.¹⁸³

When the dock was finished (some time in March 1907), Campbell for some reason did not move on to building the plank river fence. In June Campbell had still not started on the fence, and Ewald Stulpner was forced to advertise for new bids in the Fort Myers Press. There being no interested contractors, Stulpner made some intermediate repairs, fixing up the existing wire fence, and waited to hear from Campbell.¹⁸⁴

Finally, in September, Stulpner reported that he had contracted with J.L. Young to build the river fence, "as Campbell does not seem to be willing to do it."¹⁸⁵ Young had the fence installed by the middle of October (it would have been done earlier except for a slight delay while they waited for a shipment of galvanized bolts). Young installed a total of 197 panels of plank fence, for which he was paid \$551.60, or \$2.80

for each eight-foot panel.¹⁸⁶ This implies that the river fence as built was 1576 feet long.¹⁸⁷

Today, no evidence of the river fence exists.

Analysis and Recommendations

The seawall is a significant existing historic landscape element dating from the Edison's 1880s proposed plans. As with the dock and vegetation, the seawall was and continues to be particularly prone to damage from storms as well as from regular wave and tidal activity. If there are modern stabilization methods that can be employed but hidden from the historic surface character, they should be investigated.

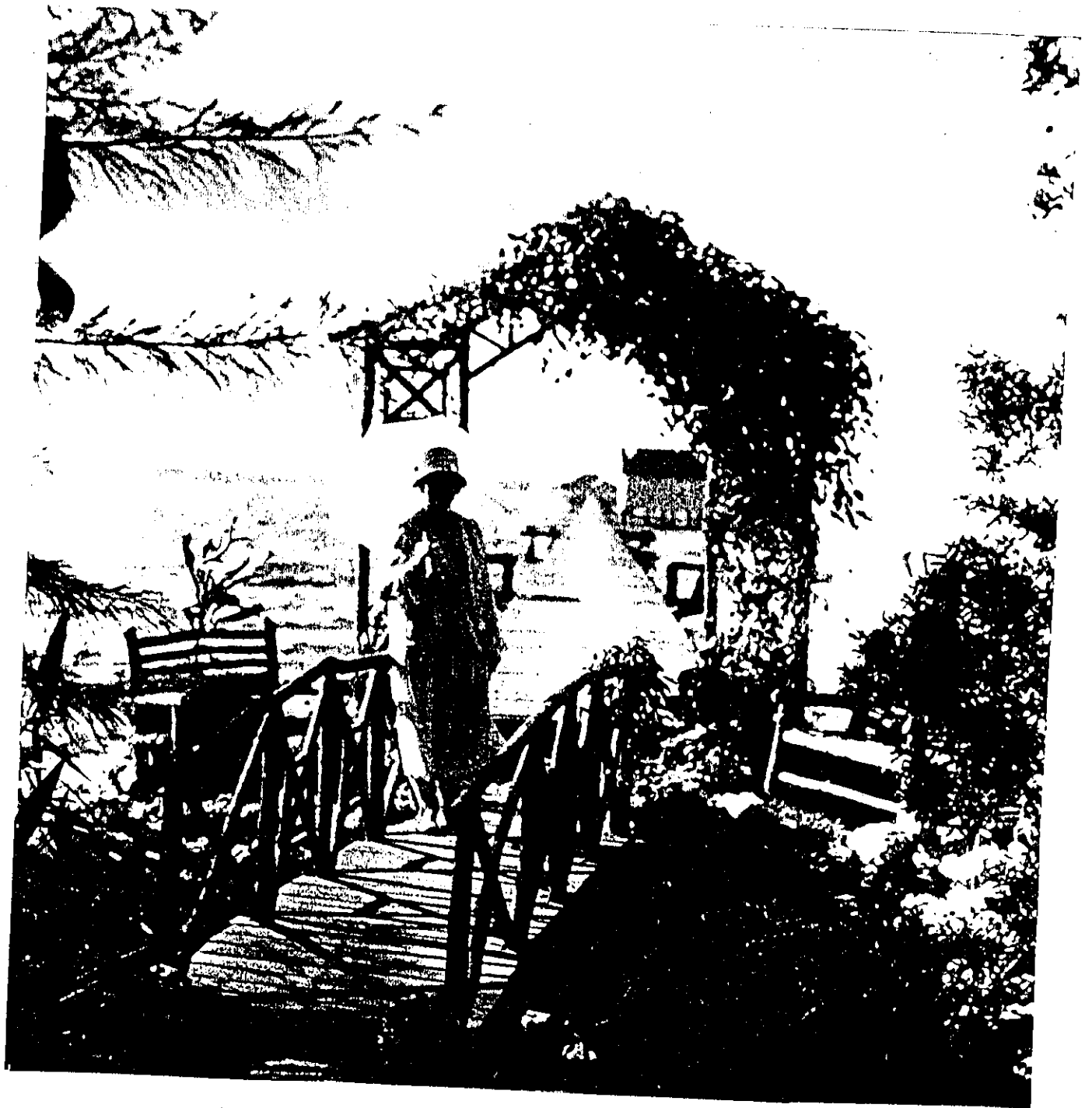
Although there seems to be a great deal of correspondence from the 1906-1907 period regarding the river fence, little else is known about its existence after that period. Neither repairs nor replacements are noted; documentary photographs from the 1920s and 1930s of the dock area do not show the fencing. It is likely that it washed away in the 1911 hurricane and not rebuilt.

- Remove some vegetation at edge if already threatened (Also would increase views to river).
- Remove all inappropriate fill such as concrete rubble pieces.
- Remove modern (not in the recommended period of interpretation) timbers near the pond adjacent to the seawall.
- Restore seawall and damage from erosion.

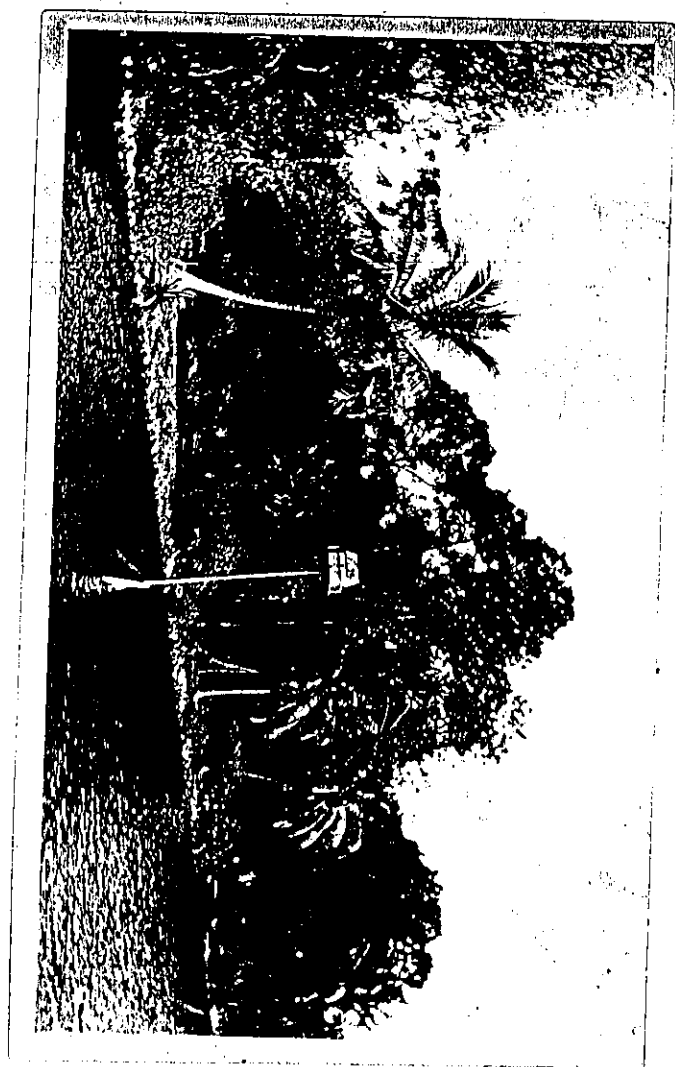


Figure 3.47. The sea wall here rises above the abutting landscape in a straighter alignment than exists at the present.¹⁸⁸

- The rustic arbor at the land end of the dock should be restored as an important element. The wooden bridge and seawall relationship at this part of the property has changed and should be restored.
- It is not recommended that the river fence be reconstructed as there is no evidence that it existed in the proposed restoration period of the 1920s and 1930s.







Mr. and Mrs. Edison enjoy the down river view of the Caloosahatchee. Did Mr. Edison see a mullet (fish) jump?

