# Lee County Board of County Commissioners Agenda Item Summary

Blue Sheet No. 20040476

#### 1. REQUESTED MOTION:

ACTION REQUESTED: Approve Purchase Agreement for acquisition of Parcel 316, Three Oaks Parkway South Extension Project No. 4043, in the amount of \$87,000; authorize payment of costs to close and the Division of County Lands to handle all documentation necessary to complete transaction.

WHY ACTION IS NECESSARY: The Board must accept all real estate conveyances to Lee County.

WHAT ACTION ACCOMPLISHES: The purchase of the property during the voluntary acquisition phase of the project.

2. <u>D</u>	EPARTMENTAL CATE	GOR	<u>Y</u> : 06		210		3.	MEETING DATE:
COM	VISSION DISTRICT #		3		6H			05-11-2004
4. <u>AGE</u>	NDA:	5.	REQUIREMENT/	PURPOSE:	-	6. <u>R</u> I	EQUESTOR O	F INFORMATION
	CONSENT ADMINISTRATIVE	v	(Specify)	405		١.		
	ADMINISTRATIVE APPEALS		_ STATUTE _ ORDINANCE	125		A. B. DE	PARTMENT	Independent
	PUBLIC		ADMIN.			C. DIV	/ISION	County Lands
'	WALK ON		OTHER			BY _	Karen L. W. Fo	orsvth. Director (/ LPi) H
TIME RE	QUIRED:							Horas

#### 7.BACKGROUND:

Negotiated for: Department of Transportation

Interest to Acquire: Fee simple, vacant residential lot

#### Property Details

Owner: Walter Bollier

Address: 24033 Cock Robin Lane, Bonita Springs

STRAP No.: 14-47-25-B2-00200.0390

#### Purchase Details

Purchase Price: \$87,000

Costs to Close: Approximately \$1,500 (The seller is responsible for attorney fees and real estate broker fees, if any. The County is

responsible for future district assessments for road and drainage improvements, which are estimated at \$9,500.)

#### Appraisal Information

Company: Carlson, Norris & Associates, Inc.

Appraised Value: \$87,000

Staff Recommendation: County staff recommends that the Board approve the Requested Motion.

#### Account: 20404330700.506110

20 - CIP; 4043 - Three Oaks Parkway South Extension; 30700 - Transportation Capital Improvement; 506110 - Land

Attachments: Purchase Agreement; Appraisal (Location Map Included); Letter from City of Bonita Springs; Title Data;

5-Year Sales History

#### 8. MANAGEMENT RECOMMENDATIONS:

9. RECOMMENDED APPROVAL:										
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Department	Purchasing or	Human	Other	County		County Manager				
Director	Contracts	Resources		Attorney		COMPA 4	129104			
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This document prepared by:

Lee County

County Lands Division

Project: Three Oaks Parkway South Extension, No. 4043

Parcel: 316/Bollier

STRAP No.: 14-47-25-B2-00200.0390

#### BOARD OF COUNTY COMMISSIONERS

#### LEE COUNTY

#### AGREEMENT FOR PURCHASE AND SALE OF REAL ESTATE

	THIS	AGREEM	ENT fo	r pur	chase	and	sale	of	real	prope	rty	is	made
t	his	_ day	of		, 20	D :	by an	d be	etwee	n <b>Wal</b> t	er E	3011	ier,
a	single	person	, herei	.nafte	r refe	erred	to a	s SE	LLER,	whose	ado	dres	s is
A	llmendst	trasse	10b,	8142	<b>Ui</b> tik	on-Wa	aldeg	g,	Switz	erland	i, E	and	Lee
C	ounty, a	politi	ical su	bdivi	sion c	f the	e Stat	te o	f Flo	rida,	here	eina	fter
r	eferred	to as	BUYER.										

#### WITNESSETH:

- 1. AGREEMENT TO PURCHASE AND TO SELL: SELLER agrees to sell and BUYER agrees to purchase, subject to the terms and conditions set forth below, a parcel of land consisting of 1.26 acres more or less, and located at 24033 Cock Robin Lane, Bonita Springs, Florida 34135 and more particularly described as Tract 39, SAN CARLOS ESTATES, according to the plat thereof recorded in Official Record Book 557, at pages 354-355, of the Public Records of Lee County, Florida, hereinafter called "the Property." This property will be acquired for the Three Oaks Parkway Extension Project, hereinafter called "the Project."
- 2. **PURCHASE PRICE AND TIME OF PAYMENT:** The total purchase price ("Purchase Price") will be Eighty-Seven Thousand and No/100 (\$87,000.00), payable at closing by County Warrant.

- 3. EVIDENCE OF TITLE: BUYER will obtain at BUYER'S expense an American Land Title Association Form B Title Commitment and provide title insurance Owner's Policy in the amount of the Purchase Price, from a title company acceptable to BUYER. The commitment will be accompanied by one copy of all documents that constitute exceptions to the title commitment. The commitment will also show title to be good and marketable with legal access, subject only to real estate taxes for the current year, zoning and use restrictions imposed by governmental authority, and restrictions and easements common to the area.
- 4. CONDITION OF PROPERTY; RISK OF LOSS: BUYER has inspected the Property and, except as is otherwise provided herein, accepts the Property in the condition inspected. Any loss and/or damage to the Property occurring between the date of this offer and the date of closing or date of possession by BUYER, whichever occurs first, will be at SELLER's sole risk and expense. However, BUYER may accept the damaged property and deduct from the purchase price any expenses required to repair the damage, or BUYER may cancel this Agreement without obligation.
- 5. **SELLER'S INSTRUMENTS AND EXPENSES:** SELLER will pay for and provide:
  - (a) A statutory warranty deed, and an affidavit regarding liens, possession, and withholding under FIRPTA in a form sufficient to allow "gap" coverage by title insurance;
  - (b) documentary stamps on deed;
  - (c) utility services up to, but not including the date of closing;
  - (d) taxes or assessments for which a bill has been rendered on or before the date of closing;
  - (e) payment of partial release of mortgage fees, if any;
  - (f) SELLER's attorney fees, if any.

- 6. BUYER'S INSTRUMENTS AND EXPENSES: BUYER will pay for:
  - (a) Recording fee for deed;
  - (b) survey, (if desired by BUYER).
- 7. TAXES: SELLER will be charged for Real Estate taxes and personal property taxes (if applicable) up to, but not including the date of closing.
- 8. DEFECTS IN TITLE AND LEGAL ACCESS: Prior to closing, BUYER will have a reasonable time to examine the title and documents establishing legal access to the property. If title or legal access is found to be defective, BUYER will notify SELLER in writing of the defects and SELLER will make a prompt and diligent effort to correct such defects. If SELLER fails to make corrections within 60 days after notice, BUYER may elect to accept the Property in its existing condition with an appropriate reduction to the purchase price, or may terminate this Agreement without obligation.
- 9. SURVEY: BUYER may order the Property surveyed at BUYER's expense. SELLER agrees to provide access to the Property for the survey to be performed. If the survey shows a discrepancy in the size or dimensions of the Property, or shows encroachments onto the Property or that improvements located on the Property encroach onto adjacent lands, or if the survey identifies violations of recorded covenants or covenants of this Agreement, upon notice to the SELLER, the BUYER may elect to treat those discrepancies, violations or encroachments as a title defect.
- 10. ENVIRONMENTAL AUDIT: BUYER may perform or have performed, at BUYER's expense, an environmental audit of the Property. If the audit identifies environmental problems unacceptable to the BUYER, BUYER may elect to accept the Property in its existing condition with an appropriate abatement to the purchase price or BUYER may terminate this Agreement without obligation.

11. ABSENCE OF ENVIRONMENTAL LIABILITIES: The SELLER hereby warrants and represents, to the best of SELLER's knowledge, that the Property is free from hazardous materials and does not constitute an environmental hazard under any federal, state or local law or regulation. No hazardous, toxic or polluting substances have been released or disposed of on the Property in violation of any applicable law or regulation. The SELLER further warrants that there is no evidence that hazardous, toxic or polluting substances are contained on or emitting from the property in violation of applicable law or regulation. There are no surface impoundments, waste piles, land fills, injection wells, underground storage areas, or other man-made facilities that have or may have accommodated hazardous materials. There is no proceeding or inquiry by any governmental agency with respect to production, disposal or storage on the property of any hazardous materials, or of any activity that could have produced hazardous materials or toxic effects on humans, flora or fauna. There are no buried, partially buried, or above-ground tanks, storage vessels, drums or containers located on the Property. There is no evidence of release of hazardous materials onto or into the Property.

The SELLER also warrants that there have been no requests from any governmental authority or other party for information, notices of claim, demand letters or other notification that there is any potential for responsibility with respect to any investigation or clean-up of hazardous substance releases on the property. All warranties described herein will survive the closing of this transaction.

In the event the SELLER breaches the warranties as to environmental liability, SELLER agrees to indemnify and hold the BUYER harmless from all fines, penalties, assessments, costs and reasonable attorneys' fees resulting from contamination and remediation of the property.

- 12. TIME AND BINDING AGREEMENT: Time is of the essence for closing this transaction. The BUYER's written acceptance of this offer will constitute an Agreement for the purchase and sale of the Property and will bind the parties, their successors and assigns. In the event the BUYER abandons this project after execution of this Agreement, but before closing, BUYER may terminate this Agreement without obligation.
- 13. DATE AND LOCATION OF CLOSING: The closing of this transaction will be held at the office of the insuring title company on or before Ninety (90) days from the date this Agreement is made. The time and location of closing may be changed by mutual agreement of the parties.
- 14. ATTORNEYS' FEES: The prevailing party in any litigation concerning this Agreement will be entitled to recover reasonable attorneys' fees and costs.
- 15. **REAL ESTATE BROKERS:** SELLER hereby agrees to indemnify and hold the BUYER harmless from and against any claims by a real estate broker claiming by or through SELLER.
- 16. **POSSESSION:** SELLER warrants that there are no parties in possession other than SELLER unless otherwise stated herein. SELLER agrees to deliver possession of Property to BUYER at time of closing unless otherwise stated herein.
- 17. TYPEWRITTEN/HANDWRITTEN PROVISIONS: Typewritten and handwritten provisions inserted herein or attached hereto as addenda, and initialed by all parties, will control all printed provisions in conflict therewith.
- 18. SPECIAL CONDITIONS: Any and all special conditions will be attached to this Agreement and signed by all parties to this Agreement.

# AGREEMENT FOR PURCHASE AND SALE OF REAL ESTATE Page 6 of 6

WITNESSES:  Altala	SELLER:  6/4 Appl 2007  Walter Bollier (DATE)
WITNESSES:	SELLER:
	(DATE)
CHARLIE GREEN, CLERK	BUYER:  LEE COUNTY, FLORIDA, BY ITS  BOARD OF COUNTY COMMISSIONERS
BY:	BY: CHAIRMAN OR VICE CHAIRMAN
	APPROVED AS TO LEGAL FORM AND SUFFICIENCY
	COUNTY ATTORNEY (DATE)

## LAND APPRAISAL REPORT

Project No. 4043

Borrower BOLLIE Property Address 24						File No. 04-0	
Property Address 24						Map Reference 14-47-2	25
	1033 Cock Robin Lane			Oaks Parkwa	y Extension Projec	t No. 4043	
City Bonita Sprin		County Le	e e		ate FL	Zlp Code 34135-6	791
	act 39, San Carlos Esta		G 354			- ·	
Sale Price \$ Not a S		N/A Loan Term		. Property F	Rights Appraised 🔯 .	Fee Leasehold	De Minimis PUI
Actual Real Estate Tax	(es \$ 734.29/03 (yr)	Loan charges to be paid	by seller \$ <u>N/</u> .	AOther sale	es concessions N/A		
	County - County Lands			ss P.O. Box 39	98, Fort Myers, FL 3	3902-0398	
Occupant <u>Vacant L</u>	.and Appraise	r <u>Phil Benning, Associ</u>	<u>iate</u> instri	uctions to Appraise	er Estimate market v	alue.	
Location	Urban	Suburban	- Rur	rai		Good	Avg. Fair Poor
Bulit Up	Over 75%	25% to 75%	J T Unv	der 25%	Employment Stability	ĨŤ.	X O
Growth Rate	Fully Dev. Rapid	Steady	Slo		Convenience to Employ	ment 🗏	
Property Values	Increasing			clining -	Convenience to Shoppir	n	
Demand/Supply	Shortage	🔀 In Balance		ersupply	Convenience to Schools		
Marketing Time	Under 3 M		_	er 6 Mos.	Adequacy of Public Trac	enortation	
•	55% 1 Family % 2-4 Fa			6 Commercial	Recreational Facilities		
_	% Industrial 45% Vacan	·	_N OUNGO A	Ochillorem	Adequacy of Utilities		
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Predominant Occupani	)	Tenant	5 % Va				
Single Family Price Ra	-				Police and Fire Protection	n 📋 i	
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douglepmental p	hose factors, favorable or unfa	vorable, affecting marketabili	ity (e.g. public par	rks, schools, view,	noise); The area is	s experiencing increa	ised
developmental pr	ressure, which is expect	ed to continue into the	near future.	Existing develo	pment is average to	custom quality hom	ies, Support
racinues are rocal	ted within two miles of th	ne subject. No adverse	e marketing fa	actors were not	<u>ced at the time of the</u>	appraisal. Subject	was not listed
in the regional MI							
	330' per Lee County Pl		_ = _		Sq. Ft. or Acres	Corner	
	AG-2 Agricultural/Resi			Present Impro	vements   do	do not conform to zoning	regulations
Highest and best use		Other (specify)			<del></del>		
Public	Other (Describe)	OFF SITE IMPROVEMEN		Level			
Elec. 🖂		et Access 🔀 Public 🛚		Typical of ar			
Gas 🔛	Surfa	ce Gravel/Sand	Shar	e <u>Primarily Re</u>	ctangular		
Nater 🔀	Available Main	tenance 🔀 Public 🛭	Private View	Residential			
San. Søwer	Septic	Storm Sewer Curi	b/Gutter Drain	nage Appears a	idequate.		
[] Un	nderground Elect. & Tel. 📗 📗	Sidewalk Stre	et Lights 🛮 Is the	e property located	in a HUD (dentified Speci	al Flood Hazard Area?	No Yes
Comments (favorable or	unfavorable including any appare	ent adverse easements, encroa-	chments, or other a	adverse conditions):	No adverse ea	asements or site con	ditions were
noted, however, r	no survey was provided.	. The site is thickly v	vooded with	primarily stur	ited malelucas and	pines. It appeared	to be high
and dry with no	observable wetlands.			1		. par. and pout co	to oc mgm
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to or more favorable th	nan the subject property, a min	us (-) adjustment is made th	ous reducing the i	indicated value of s	subject: if a significant iter	n in the comparable is infe	rior to or less
favorable than the subj	ject property, a plus (+) adjust	ment is made thus increasin	g the indicated vi	alue of the subject.		. III are compared to the	
ITEM	SUBJECT PROPERTY	COMPARABLE 1	NO 1	COME	ARABLE NO. 2	COMPARABL	E MO 2
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## Supplemental Addendum

Borrower/Client BOLLIER, Walter

Droperty Address 24033 Cock Robin Lene
Cly Bonits Springs
County - County Lands
Cly Bonits Springs
County Lands
County Lands
County Lands

#### PURPOSE, FUNCTION AND SCOPE OF THE APPRAISAL

The purpose of the appraisal is to estimate market value of the subject as of the effective date of the appraisal. The function (use) of the appraisal is for providing the Lee County Commissioners with sufficient data to make an informed decision regarding the possible purchase of the property.

The scope of this appraisal encompasses the necessary research and analysis to prepare a report in accordance with the USPAP of the Appraisal Foundation. Data sources typically include observation, public records, First American Real Estate Services, REXxplorer Internet System, MLS, Realtors, other professionals, appraiser's files, builder's confracts, and cost services (Marshall and Swift).

A thorough search is conducted for comparable properties within an appropriate market area and time frames. The most comparable properties are compared to the subject with appropriate adjustments made for significant differences. The data provided in the report is representative of the market and is presented in the attached addends. Limiting conditions are described in the attached addends.

#### USPAP CERTIFICATION

The appraisal assignment was not based on a requested minimum valuation, a specific valuation, or the approval of a loan.

#### TAO93R JASIAR9A YRAMMUS

This is a Summary Appreisal Report which is intended to comply with the reporting requirements set forth under Standards Rule 2-2(b) of the Uniform Standards of Professional Appreasal Practice for a Summary discussions of the data, reasoning, and analyses that were used in the appreisal process to develop the appreiser's opinion of value. Supporting documentation that is not provided with the report concerning the data, reasoning, and analyses is retained in the appreisal process to develop the calcusations of the data, reasoning, and analyses is retained in the appreisal series files. The depth of the discussion contained in this report is specific to the needs of the client and for retained in the appreisal series in a day of the discussion contained in this report. The appreisant is not responsible for unauthorized use of this report.

#### COMMENTS ON THE MARKET AREA

The subject is located in San Carlos Estates, a development of mostly 1.25 acre parcels in Bonita Springs. Larger, wooded tracts and mart surfaced roads give this development somewhat of a "country" flavor which appeals to many buyers. San Carlos Estates exhibit a wide range. Carlos Estates hos proximity to area facilities in Bonita Springs. Improvements in San Carlos Estates exhibit a wide range of home size, style, age and quality. Newer homes seem to be trending toward larger, good quality ranch or pilling homes.

#### COMMENTS ON THE ROAD MAINTENANCE

The streets are reportedly maintained by the San Carlos Estates Drainage District, an independent special district (similar to a special file, or mosquito control district), which was created in 1982 per OR 1615, PG 0477, for drainage management (which includes the roads & swales). Each owner is reportedly assessed a nominal maintenance fee (\$404) included as special annual assessment & collected in conjunction with the real estate taxes.

Septic systems and mark surfaced roads are typical for the area and are not considered detrimental to marketability. The dirt roads are periodically graded by above mentioned San Carlos Estates Drainage district rendering them "all weather," roads and mastled eves round. San Carlos Estates is experiencing new development with new housing starts observed throughout the market area.

Publicity regarding the future intent to pave the roads in San Carlos Estates appears to be driving this active market. This area continues to have good market appeal with Realtor reinforcement of the limited availability of facre+ residential homesites west of Interstate 75.

#### COMMENTS ON THE WETLANDS

The San Carlos Estates reportedly is currently made up of +/-38% wetlands. The subject lot does not appear to have wetlands as reported by Lee County Property Appraiser Geographic Information System - Spatial District Query Report. Area Realtors report that wetlands on site are acceptable in this market with typical buyers willing to assume the risk associated the possible consequences of environmental impact.

#### COMMENTS ON THE SALES COMPARISON ANALYSIS

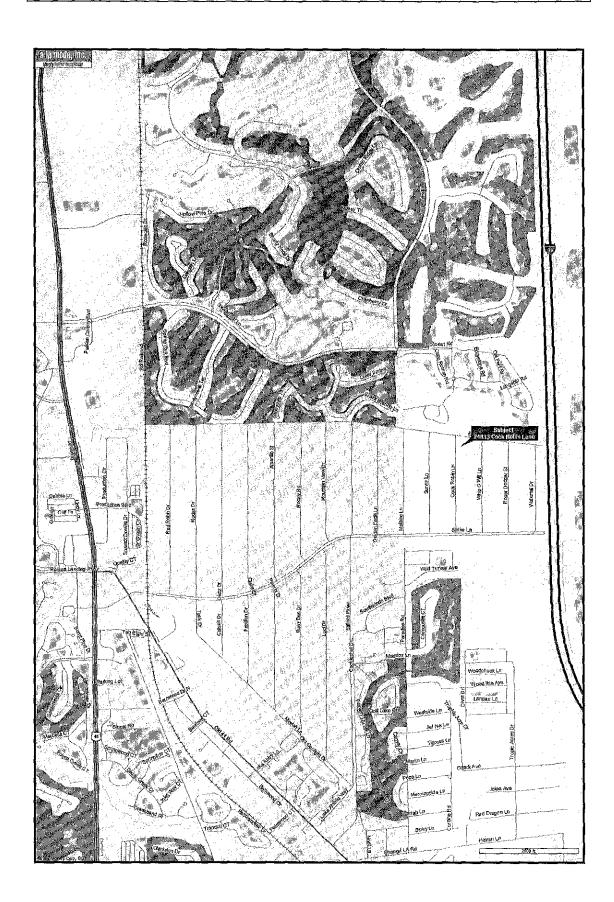
The subject is compared to three sales of 1.25 acre vacant parcels in San Carlos Estates.

All sales are recent and similar parcels in San Carlos Estates.

Sale #1 is the most recent and receives the greatest emphasis in support of the final value estimate. Sales #2 and #3 support the upper and lower limits of the value range respectively.

### **Location Map**

Borrower/Client BOLLIER, Walter			
Property Address 24033 Cock Robin Lane	Parcel	316, Three Oaks Parkway Extension F	Project No. 4043
City Bonita Springs	County Lee	State FL	Zip Code 34135-6791
Lender Lee County - County Lands			· 1





# APR 1 5 2004

# City of Bonita Springs

9220 BONITA BEACH ROAD SUITE 111 BONITA SPRINGS, FL 34135 Tel: (239) 390-1000 Fax: (239) 390-1004 www.cityofbonitasprings.org

**Paul D. Pass** Mayor

Wayne P. Edsall Councilman District One

Jay Arend Councilman District Two

R. Robert Wagner Councilman District Three

John C. Warfield Councilman District Four

**David T. Piper, Jr.**Councilman
District Five

Ben L. Nelson, Jr. Councilman District Six

 $\sim$ 

Gary A. Price City Manager

Audrey E. Vance City Attorney April 13, 2004

Mr. J. Keith Gomez Property Acquisition Agent Lee County PO Box 398 Fort Myers, FL 33902

RE: Purchase Agreement – Three Oaks Parkway Extension Project No. 4043 Parcel 316, Bollier

Dear Mr. Gomez:

The agreed upon purchase conditions for the aforementioned parcel are reasonable and purchase is recommended by my office.

If you need further authorization, feel free to contact me.

Respectfully,

Gary A Price City Manager

GAP/kw

# **Division of County Lands**

## **Ownership and Easement Search**

Search No. 14-47-25-B2-00200.0390

Date: November 4, 2003

Parcel: 341

Project: Three Oaks Parkway South Extension,

Project 4043

To: J. Keith Gomez

**Property Acquisition Agent** 

From: Shelia A. Bedwell, CLS

Property Acquisition Assista

STRAP: 14-47-25-B2-00200.0390

Effective Date: October 7, 2003, at 5:00 p.m.

Subject Property: Tract 39, of that certain subdivision known as San Carlos Estates, according to the map or plat thereof on file and recorded in the office of the Clerk of the Circuit Court of Lee County, Florida, in Official Record Book 557, Page(s) 354-355.

Title to the subject property is vested in the following:

#### Walter Bollier

By that certain instrument dated August 22, 1996, recorded September 3, 1996, in Official Record Book 2740, Page 2297, Public Records of Lee County, Florida.

#### Easements:

- 1. Dedication of Easements for drainage, roads and streets, recorded in Official Record Book 535, Page 826, Public Records of Lee County, Florida.
- 2. Non-exclusive utility and roadway easement over and across or below all roadways shown on plat of San Carlos Estates, recorded in Official Record Book 1307, Page 36, Public Records of Lee County, Florida.
- 3. Ten foot easement reservation on all sides for utility maintenance, as described in instrument recorded in Official Record Book 1495, Page 1941, Public Records of Lee County, Florida.

NOTE (1): Judgment creating and incorporating San Carlos Estates Drainage District, recorded in Official Record Book 521, Page 120, Public Records of Lee County, Florida.

Tax Status: Taxes for the year 2002 are paid; 2003 taxes are now due and payable. (The end user of this report is responsible for verifying tax and/or assessment information.) The Division of County Lands has made a diligent search of the Public Record. However, this report contains no guarantees nor warranty as to its accuracy.

# 5-Year Sales History

Parcel No. 316

Three Oaks Parkway South Extension Project No. 4043

**NO SALES in PAST 5 YEARS**