

## Amelia Park Case Study

Having an understanding of looming demographic changes combined with an intimate knowledge of a place and its people can enable a developer to create a community that provides enduring value long after its first homes are sold. This is the key lesson of the story of Amelia Park — one of the first traditional neighborhood design communities in Florida. Amelia Park's developer, Joel Embry, understood the potential of the "New Urbanism" to create a place that would make life and living easier for new retirees and the elderly as well as for young families and singles. In the decade and a half that have passed since he first broke ground in Fernandina Beach, Embry has stayed true to his vision while using lessons learned to refine and improve the development along the way. Today Amelia Park is close to completion and because it is one of the few communities offering the type of development a growing segment of homebuyers want, it continues to gain in home sales and is well-positioned to take advantage of the coming market rebound.

### Discerning the Market & Forging a Vision

In the 1980s Joel Embry stumbled upon the new development of Seaside when it was at its very beginning stages. In talking to the developer there he learned that its design represented a new trend toward traditional neighborhood design called "New Urbanism" that drew from the design and workings of historic communities like Embry's hometown of Quincy, Florida. At the same time Embry had been contemplating what the impending retirement of the Baby Boomer generation would mean for the future of housing developments. Florida was then experiencing a great migration of retirees to the state that was forecasted to only get stronger as the Baby Boomer generation began to enter retirement age. He saw the potential of creating a place that combined the design ideals of New Urbanism — with its emphasis on mixed-use buildings, pedestrian-friendly streets, and emphasis on community-building — with specific services that would allow older residents to age in place.<sup>1</sup>

To help determine what kind of community would appeal to seniors, Embry consulted the AARP's triennial study on national housing preferences of older Americans. In a white paper comparison by Embry titled "Amelia Park: Options for Older Residents" he cites nine factors that make Amelia Park "an innovative model of community development that addresses stated preferences and needs of elderly and aging Americans in ways that have never before been offered."<sup>2</sup> Two of the major findings in this study are that 85% of respondents would not want to move from their homes as they got older and needed more care, and that a majority preferred to live in mixed-age communities.<sup>3</sup> However, the supply of housing that would meet this demand did not exist. Even today, Embry notes that "we are still building age-segregated facilities. We are still are moving people to places for aging instead of moving services to people."<sup>4</sup>

Embry worked with the U.S. Census Bureau to commission a study to determine when the Baby Boomers would begin to turn 65, the age when most older Americans retire and make lifestyle changes.<sup>5</sup> The graph of their findings (see Figure 1) predicted a spike in the number of Americans turning age 65 beginning in 2011. That number would peak in 2025 and remain consistently higher than the 2011 spike through 2050.

This research into demographics combined with Embry's experience creating six other developments on Amelia Island and several redevelopment projects in Fernandina Beach's historic downtown gave him insight into what the local community would want in new housing and what amenities, features and types of housing were missing in Fernandina Beach that he could integrate into Amelia Park to appeal to homebuyers of all ages.<sup>6</sup>

### Amelia Park's Original Goals and Design Process

The design process for Amelia Park began in 1992. Figure 2 lists Embry's original goals for the community, the two most important of which were to create a place where residents could age in place and to design it to appeal to an "intergenerational mix of residents."<sup>7</sup> To create the master plan for the community he hired Duany Plater-Zyberk & Company (DPZ), who had designed the plan for Seaside. To bring in expertise on the aging process and how best to serve the special needs of seniors with chronic conditions, Embry brought to the early design meetings an expert on these subjects, Margaret Lynn Duggar, former Florida Secretary of Aging and Adult Services.<sup>8</sup>

One of the issues with which older adults with chronic conditions must contend is the need to be able to access healthcare services on a regular basis. The location of Amelia Park — adjacent to a hospital and its associated medical offices — provided an immediate benefit of placing residences in close proximity to healthcare providers. Embry wanted to take this one step further by offering a telemedicine\* service to Amelia Park's residents.

According to Embry, the telemedicine system would be a "Key element of the solution for delivering services to patients who could still live at home instead of moving to an institution."<sup>9</sup> Embry secured grant funding to test out the service, made sure every home would have wiring necessary to allow high-speed Internet streaming into any room in the house and had fiber optic cable installed in the development.<sup>10</sup> This type of infrastructure has wide appeal, not only for providing a telemedicine service, but also allows people to work from home and provides the high-bandwidth in demand for home Internet access.

To encourage walking and community-building, Amelia Park was designed to be pedestrian-friendly, with tree-lined streets, wide sidewalks, and traffic-calming features. Gentle slopes and curbs were constructed before the Americans With Disabilities Act required them to do so.<sup>11</sup> Rear-loading alleys allowed front porches instead of driveways to dominate the front view of the homes, and mail delivered to small communal kiosks of mailboxes placed around the community to further encourage interaction (see Figure 3). Another important feature is the YMCA, which was the first building to open at Amelia Park. "We liked the idea of creating recreational and healthcare amenity before building

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\* The American Telemedicine Association defines telemedicine as "the use of medical information exchanged from one site to another via electronic communications to improve patients' health status." It can include "videoconferencing, transmission of still images, remote monitoring of vital signs, continuing medical education and nursing call centers."

houses,” Embry said. “A lot of people made their decision to live in Amelia Park versus another subdivision because the YMCA was there.”<sup>12</sup>

To further appeal to a mix of ages, playgrounds, a community green, a Montessori school and a church were all part of the original plan for Amelia Park. Also, the original master plan called for a mix of housing types and styles to meet the income levels of a variety of homebuyers. When fully developed it will contain about 420 residential units, 70,000 square feet of commercial/retail space, and 25,000 square feet of office space.<sup>13</sup>

#### Embracing a Historic Downtown to Market the New Urbanism

The first group of people who had to be convinced of the merits of Amelia Park was the Fernandina Beach City Commission. Twenty-six variances from the existing zoning code were needed to implement the plan on its intended 106-acre site. The effort to secure a Planned Unit Development ordinance for Amelia Park went “very smoothly,” according to Embry, because he used photographic examples from the Fernandina Beach historic downtown as examples of the types of setbacks, porch widths and mixed-use buildings they wanted to zone for in Amelia Park.<sup>14</sup> At the time, traditional neighborhood design communities like this one were just beginning to emerge. By comparing requested features — like setbacks, porch widths, mixed use buildings — to something historic and familiar, he was able to win support for every variance requested.<sup>15</sup> His efforts to get a Community Development District (CDD) approved for Amelia Park did not go as smoothly. “City Commissioners had concerns about creating an authority controlled by a developer who could sell bonds, and by the time we got the CDD, the market was terrible,” Embry said.<sup>16</sup> Because of his extensive experience as a developer in the community, local lenders knew him well, and in the end the project was financed by commercial bank financing.<sup>17</sup>

To market Amelia Park to prospective homebuyers, a mix of direct marketing in the local region, including Jacksonville, and in parts of Georgia, including Atlanta, was coupled with a national public relations effort.<sup>18</sup> This approach worked well, especially in the local market where according to Embry, Fernandina Beach’s “downtown was becoming increasingly popular — people were drawn to its historic neighborhood style.” He adopted a marketing approach where he would tell homebuyers that if they liked this style of community they could live in the historic downtown or Amelia Park, the “difference between the two is that we don’t have bad plumbing or termites.”<sup>19</sup> The PR push yielded some prospects from Chicago and New York, as well.<sup>20</sup>

#### Economic Impact of Environmental Features and Infrastructure Design

A visit to Amelia Park shows that the community was developed with nature and the environment in mind. Indeed, it has many of the features required for LEED Neighborhood Development certification,<sup>21</sup> which was established to recognize and encourage the development of environmentally sustainable communities.<sup>22</sup> Some of these include compact development, a reduced parking footprint, access to civic and public spaces, access to recreation facilities, tree-lined and shaded streets, and water-efficient landscaping.<sup>23</sup>

Many of these features allowed the developer to realize higher profitability on Amelia Park. Although more was spent to develop each lot than in a conventional suburban design community, the higher density of the development yielded more lots and more dwelling units per acre.<sup>24</sup> The use of native landscaping reduces the long-term costs of lawn maintenance and softens the visual boundary between properties to create the illusion that more space lies between each home than there actually is (see Figure 4).<sup>25</sup> Part of the intention behind using traditional architectural styles and native landscaping was to make the community appear as if it had been part of the greater Fernandina Beach community a lot longer than it actually has, creating a sense of authenticity that would appeal to the local market.<sup>26</sup>

A way in which native landscaping and New Urbanist infrastructure combined to save money and allow for premium pricing was in the creation of the Garden District trail. This is a wide natural space that runs between homes from the lake to the community green (see Figure 5). It provides a pleasant walking experience, reduces the amount of impervious surface in the development (and thus capacity of stormwater retention needed), and makes the homes along the path seem as if they have more space between them than they do (see Figure 6). It has become one of the distinguishing characteristics of Amelia Park and sets it apart from other traditional neighborhood design developments. However, this key benefit was originally intended to be a paved road between the homes.<sup>27</sup> When costs began to pile up due to alley construction and other infrastructure needs, Embry and his partners met with Andres Duany to revise the master plan to see where savings could be found. Duany proposed that they eliminate the proposed street and replace it with the garden and path that are now there. This move cut \$600,000 from the total development cost.<sup>28</sup> “I bought the first block closest to the lake,” Embry said, adding that he saved stormwater, paving, water, sewer and maintenance costs on developing homes in this section, and was able to “charge a 15% premium because they were beautiful.”<sup>29</sup>

#### Site Location and Retail

The site chosen for Amelia Park was an undeveloped 106-acre infill parcel surrounded by new strip malls and other retail and commercial development, in addition to the hospital (see Figure 7). “We described Amelia Park as the new downtown center of Amelia Island,” said Embry.<sup>30</sup> Though close to shopping, one of the goals of the development was to incorporate retail and office space within walking distance of residences (see Figure 2).

Today much of the retail space is empty.<sup>31</sup> Embry cites timing and the current economy as the two biggest factors for this. When retail space was ready in Amelia Park, “there were plenty of good corners left in central part of the island,” he said. In addition, “We had architectural requirements that cost more money than these other sites, or we were going to build it ourselves and charge more rent.”<sup>32</sup> At about the same time that the corner lots were taken, the market crashed.<sup>33</sup> Residents in Amelia Park agree with Embry that the retail is the missing piece in the development and would like to have a restaurant they could walk to.<sup>34</sup> Embry had encouraged a popular local restaurant, KP’s Deli, to relocate to Amelia Park. However, when the owners purchased the restaurant space, they not only moved the restaurant to a less visible location (Amelia Park’s retail space runs perpendicular to the main roadway), they also

changed their menu and dining atmosphere to the extent that it lost its appeal to their regular customers. The crash in the economy was the final straw that forced the restaurant to close.<sup>35</sup>

#### Amelia Park Today

Amelia Park was conceptualized more than 20 years ago at a time when traditional neighborhood design developments were far from mainstream. The project has evolved and changed over time, and market forces around it have evolved as well.

In addition to the Montessori school, there are still about 60 dwelling units out of an allowed 420 left to be built, and the town center still needs to be completed.<sup>36</sup> Embry estimates it could take about five years to complete construction in the community, depending on the market, and believes absorption of the remaining houses is going to occur slowly.<sup>37</sup> He is optimistic that the retail goals for the community will be realized when the market rebounds.<sup>38</sup> The community green adjacent to the retail space has been alive with regular events, most of which are organized by the neighborhood association. Regular jazz concerts and monthly Friday parties are held there. People from around the community can host events on the square, as well, making it an amenity for the greater Fernandina Beach community.<sup>39</sup>

Though the grant-funded testing of the telemedicine system was successful, it has not yet been implemented at Amelia Park because no doctors' offices were willing to participate in the system.<sup>40</sup> However, Embry has not given up on his vision for the service. "The Obama administration has tackled this like no administration before," he said, adding that the state of Florida has been experimenting ways to "standardize medical records so that data is transferrable with patients' permission."<sup>41</sup>

The local real estate market has changed since construction began in the mid-1990s. More people have been introduced to Amelia Island as vacationers or visitors, and many are looking to return.<sup>42</sup> Demand has increased among people who already live on the island who want to retire in Amelia Park.<sup>43</sup> Embry has recently taken what he learned from development and sales of the Garden District homes to develop higher-end homes on some of the remaining lots in the development. This has allowed him to offer a product to prospective buyers who may have previously been drawn to the higher end homes at Amelia Island Plantation.

#### Well-Positioned for the Rebound

Even during these challenging economic times, though total sales are down, Amelia Park's share of the local market has risen.<sup>44</sup> "In my experience we are poised to be the first neighborhood to rebound," Embry said, noting that "we have more houses under construction now than in 2008 and 2009 combined."<sup>45</sup>

Embry's optimism is backed up by current market and demographic research. Study after study confirms a significant demand for traditional neighborhood design communities.<sup>46</sup> And though New Urbanism is no longer as new as when Embry first glimpsed Seaside, there are not nearly as many communities like it to meet this demand.

According to a study by Robert Charles Lesser & Co. LLC, 30% of homebuyers would prefer to live in a smart growth community like Amelia Park and this demand will grow as Baby Boomers reach retirement and as Generation Y begins to enter the home-buying market.<sup>47</sup> In addition, a University of Virginia study finds that an over-surplus of conventional suburban design homes is contributing to their shunning by today's Generation X homebuyers. The study found that "from 2000 to 2009, the number of homeowners 55 and over who may want to sell increased by 8 million, while the number of potential 30- to 45-year-old homebuyers decreased by 3.6 million."<sup>48</sup> With this imbalance, there is "increased uncertainty about the wisdom of buying if homes are difficult to sell and too many are in locations where demand has declined, especially the outer suburbs with high foreclosure rates," said the report's author, William H. Lucy. "Location is more important than ever, and how location is interpreted has changed."<sup>49</sup>

AARP's 2010 Home and Community Preferences of the 45+ Population also shows that the ideas that Embry started out with on retirees' preferences have held true. In the study about three-fourths of respondents said they would like to stay in their homes as long as possible.<sup>50</sup> Today 80% of Amelia Park's homeowners are over the age of 50, and about 60% of all homeowners are retired.<sup>51</sup> A 2010 U.S. Census confirms and expands on earlier projections that Embry commissioned at the start of the project, noting that by 2050 the number of Americans 65 and older is projected to be about 88.5 million and that "they will begin crossing into this category in 2011."<sup>52</sup>

Amelia Park has benefited from the long-term vision and patience of its developer. "We could have marketed and facilitated Amelia Park to grow faster," Embry said, "but it would have evolved very differently."<sup>53</sup> For example, ideas like the Garden District path stemmed from a need in the middle of the project to save hundreds of thousands of dollars. Not only did that solution provide the necessary savings in terms of cost, it allowed for premium pricing of the homes that ran alongside it. Adaptations have also been made to improve services for elderly residents as people who were already dealing with chronic problems of aging were some of the first to move into Amelia Park.<sup>54</sup> "From an aesthetic, quality and social perspective, building slower has paid great dividends," he said.<sup>55</sup> By watching demographic trends, listening to people in his community, and staying true to his original goals, Embry has ensured the current and future success of Amelia Park as a place that will provide value to its residents in terms of lifestyle and as an investment for generations to come.

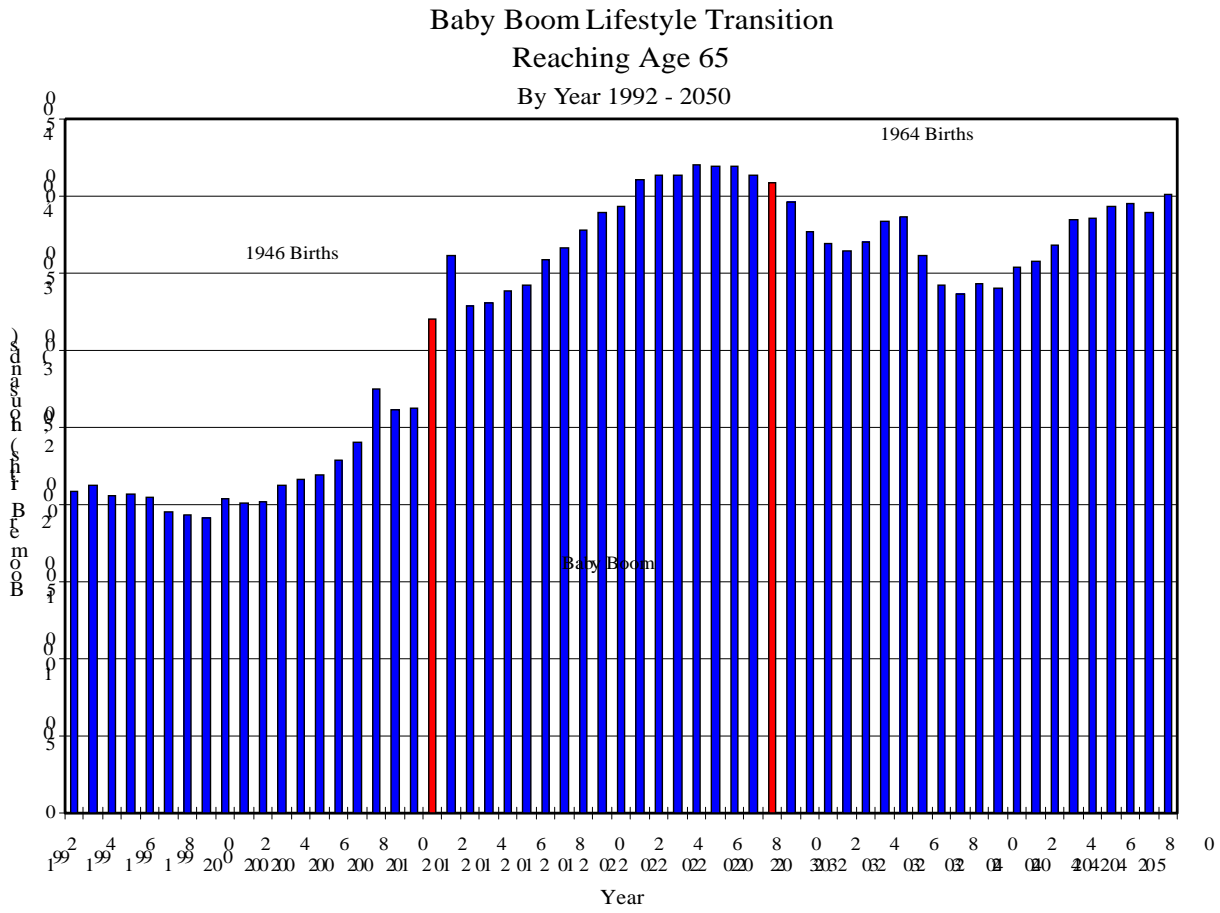


Figure 1. This chart shows the number of Americans age 65 in any given year between 1992 and 2050. Embry commissioned this data from the U.S. Census during the initial stages of Amelia Park. Chart included here courtesy of Joel Embry.

Figure 2. Objectives of Amelia Park

Aging-in-Place

- Walkable
- Inter-generational mix of residents
- In-home support and health care
- Accessible services within or near neighborhood
- Continuum of housing types
- Ease of connectivity with neighbors

Live-work-play Neighborhood

- Mix of residential, retail, office and civic uses
- Civic, education and recreation facilities
- Advanced communications infrastructure
- Regulatory approval of home businesses
- Neighborhood work center
- Support for telecommuters

Price Accessibility

- Mix of housing types and prices
- Broad range of pricing options
- Mid-market pricing
- Competitive with conventional subdivisions

Superior Value

- Superior urban environment
- Consistent quality design and construction
- Customer satisfaction goal of all creators
- "More than your money's worth"

Model for Coherent Local Growth Pattern

- Reflective of local historic neighborhoods
- Compact development
- Walkable, mixed-use
- Narrow, interconnected streets
- Neighborhood civic life



Figure 3. In support of community-building among residents, mail is delivered to communal mailbox kiosks like these that provide benches and shade to serve as meeting places.





Figure 4. This photo shows how native landscaping allows for more density get gives the illusion of less density. This photo was taken from a porch of one home. From this vantage point, the home on the left is barely distinguishable, and the home on the right cannot be seen.



Figure 5. Amelia Park plan map showing the location of the Garden District trail.  
Map source: DPZ Web Site ([www.dpz.com](http://www.dpz.com))



Figure 6. A home along the Garden District path.

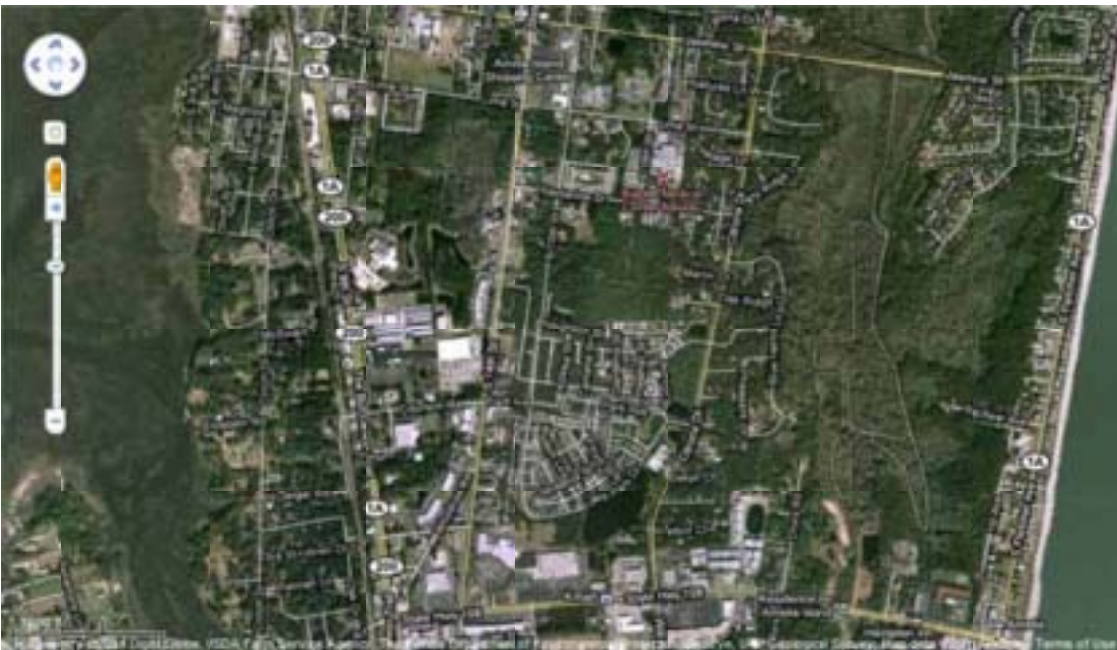


Figure 7. This map shows the location of Amelia Park relative to the hospital, Baptist Medical Center Nassau. Other health-care facilities are located within the same blocks as the hospital. The map labels a Kmart to the south. There is also a grocery store on this same street, and other services and restaurants around the development. While not part of the development itself, these businesses are within walking and biking distances of most of the residences, or are a short drive. The map also shows the location of Amelia Park in relation to the beach and the Intracoastal Waterway. While not directly on the water, it is close enough to provide easy access to recreation that those features of the community provide. Source: Google Earth/Maps.

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## Notes

<sup>1</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>2</sup> Embry, Joel. Amelia Park — Options for Older Residents.

<sup>3</sup> Embry, Joel. Amelia Park — Options for Older Residents.

<sup>4</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>5</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>6</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>7</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>8</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>9</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>10</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>11</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>12</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>13</sup> Scott, Jean, Ed. Congress for the New Urbanism, Florida Chapter. A Guidebook to New Urbanism in Florida: 2005.

<sup>14</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>15</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>16</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>17</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>18</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>19</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>20</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>21</sup> Features were documented by the author of this paper during a field trip to Amelia Park with Dr. Bruce Stephenson during his class, "Sustainable Spaces and Places." Jan. 16, 2011.

<sup>22</sup> U.S. Green Building Council, LEED ND Fact Sheet.

<sup>23</sup> U.S. Green Building Council, LEED 2009 for Neighborhood Development Project Checklist.

<sup>24</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>25</sup> Observations made by the author of this paper during a field trip to Amelia Park with Dr. Bruce Stephenson during his class, "Sustainable Spaces and Places." Jan. 16, 2011.

<sup>26</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>27</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>28</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>29</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>30</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>31</sup> Observation made by the author of this paper during a field trip to Amelia Park with Dr. Bruce Stephenson during his class, "Sustainable Spaces and Places." Jan. 16, 2011.

<sup>32</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>33</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

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<sup>34</sup> Observation made by the author of this paper during a field trip to Amelia Park with Dr. Bruce Stephenson during his class, "Sustainable Spaces and Places." Jan. 16, 2011.

<sup>35</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>36</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>37</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>38</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>39</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>40</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>41</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>42</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>43</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>44</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>45</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>46</sup> These include:

- Congress for the New Urbanism, "In a Downturn and Beyond, Urbanism has Critical Economic Advantages." [cnu.org](http://cnu.org): posted March 24, 2010.
- Ford, Jonathan. Morris Beacon Design. Smart Growth & Conventional Suburban Development: An infrastructure case study completed for the EPA. Jan. 13, 2010
- Logan, Gregg; Siejka, Stephanie; & Kannan, Shyam. Robert Charles Lesser & Co. LLC. The Market for Smart Growth. Jan. 27, 2007.
- Lucy, William H. & Lewis, Jr., Lawrence. University of Virginia. A Different Path to a Housing Rebound. Sept. 20, 2010
- Urban Land Institute and PricewaterhouseCoopers LLP, Emerging Trends in Real Estate® 2011. Washington, DC: Urban Land Institute, 2010.

<sup>47</sup> Logan, Gregg; Siejka, Stephanie; & Kannan, Shyam. Robert Charles Lesser & Co. LLC. The Market for Smart Growth. Jan. 27, 2007.

<sup>48</sup> Lucy, William H. & Lewis, Jr., Lawrence. Univ. of Virginia. A Different Path to a Housing Rebound. Sept. 20, 2010.

<sup>49</sup> University of Virginia, "Changing Demographics Play a Key Role in Housing Crisis, According to New U.Va. Report" (Press Release on A Different Path to a Housing Rebound) Sept. 24, 2010.

<sup>50</sup> Kenan, Teresa A., AARP, Home and Community Preferences of the 45+ Population. November 2010.

<sup>51</sup> Robert Charles Lesser & Co. LLC. Advisory Services For The Redevelopment Of The Panama City/Bay County International Airport Site; Panama City, FL. April 23, 2008.

<sup>52</sup> Vincent, Grayson K. and Victoria A. Velkoff, 2010, THE NEXT FOUR DECADES, The Older Population in the United States: 2010 to 2050, Current Population Reports, P25-1138, U.S. Census Bureau, Washington, DC.

<sup>53</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>54</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

<sup>55</sup> Embry, Joel. Telephone interview. Feb. 28, 2011.

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