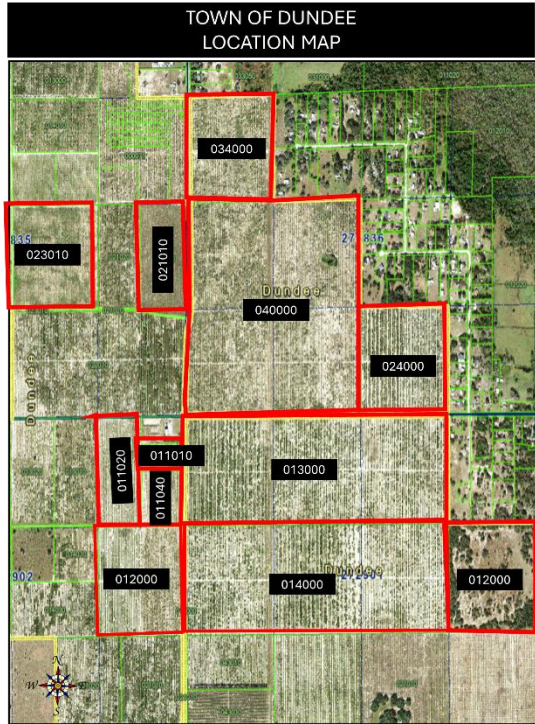


# Town of Dundee Town Commission Staff Report Estes PUD Major Amendment to Ordinance 15-05



<b>To:</b> Planning and Zoning Board
<b>Agenda Date:</b> May 21, 2026
<b>Department:</b> Planning and Zoning
<b>Discussion Topic:</b> Major Amendment to Ordinance 15-05-PUD-MU-Estes Grove Subdivision
<b>Applicant:</b> Heather Wertz, Absolute Engineering, INC.
<b>Property Owner:</b> Cassidy Land Development, LLC
<b>Planning &amp; Zoning Board Recommendation:</b> Pending
<b>Town Commission Hearing:</b> Pending
<b>Town Commission Adoption Hearing:</b> N/A
<b>DEO Comments:</b> N/A
<b>Prepared By:</b> Lorraine Peterson, Development Director



## SITE LOCATION

The proposed site is located on 638.76 +/- acres of land, on the east and west sides of Lake Mabel Loop Road, north and east sides of Canal Road in the Town of Dundee in Sections 35,36,02, and 01 Townships 28 and 29, Range 27, further described as parcels:

- |                      |                      |
|----------------------|----------------------|
| 272835-000000-023010 | 272902-000000-011040 |
| 272836-000000-034000 | 272836-000000-024000 |
| 272836-000000-040000 | 272902-000000-011010 |
| 272902-000000-012000 | 272901-000000-013000 |
| 272835-000000-021010 | 272902-000000-011020 |
| 272901-000000-014000 | 272901-000000-012000 |

# Town of Dundee

## Town Commission Staff Report

### Estes PUD Major Amendment to Ordinance 15-05

#### **BACKGROUND**

The proposed residential/commercial development known as Estes Groves Subdivision originally annexed ten (10) parcels totaling approximately 560.5 +/- acres into the Town of Dundee through **Ordinance No. 07-27**, approved on December 11, 2007.

Subsequently, **Ordinance No. 09-03**, approved on October 26, 2010, as part of the EAR-based Comprehensive Plan amendments, amended the Future Land Use Map (FLUM) designation from Agricultural/Rural Residential (A/RR) to Low Density Residential on approximately 393 +/- acres and Multi-Use Village Center on approximately 167.5 +/- acres.

Thereafter, **Ordinance No. 15-05**, approved on May 9, 2015, amended the Official Zoning Map to designate the approximately 560.5 +/- acre property as Planned Unit Development Mixed Use (PUD-MU).

Additionally, **Ordinance No. 15-04**, approved on May 26, 2015, amended site-specific Future Land Use Policy 2.14(p) by removing the maximum development limitation of 786 dwelling units and 25,000 square feet of non-residential uses associated with the Multi-Use Village Center future land use designation through the 2030 planning horizon for the Estes Groves property.

Most recently, **Ordinance No. 25-05**, approved on January 13, 2026, annexed Parcel No. 27-29-01-000000-012000 into the Town of Dundee as an expansion of the Estes Groves project area, increasing the total project acreage to approximately 638.76 +/- acres.

#### **ANALYSIS**

The developer is requesting a Major Modification to PUD Ordinance No. 15-05, to include the following:

- Addition of Parcel #s 272835-000000-023010& 272901-000000-012000 to the PUD Boundary
- Moving the 15-acre school & 5 acre commercial from the east side of Lake Mabel Loop Road to the west side of Lake Mabel Loop Road North of Almburg Road.
- Defining lot layout and lot sizes per original PUD conditions.
- Changes to external access points.
- Reduction in overall project density.
- Add Welsh Road extension right-of-way dedication.
- Adding project phasing.

# Town of Dundee

## Town Commission Staff Report

### Estes PUD Major Amendment to Ordinance 15-05

The property consists of approximately 638.76 acres located within the southeastern portion of the Town of Dundee, west of Lake Pierce and east of Lake Annie. The property is situated on both the east and west sides of Lake Mabel Loop Road and is bisected by Canal Road in an east-west direction.

The current use of the property is citrus groves. The adjacent properties carry Future Land Use designations of Dundee Low Density Residential (LDR) to the west and south, and Polk County Agricultural/Rural Residential (A/RR) to the north and east.

The proposed Future Land Use amendment to Low Density Residential (LDR) permits a maximum density of up to five (5) dwelling units per acre. The proposed rezoning to Residential Single-Family-3 (RSF-3) is consistent with the allowable density established under the LDR Future Land Use designation.

The requested Future Land Use amendment and Major Modification to PUD Ordinance No. 15-05 are intended to support planned residential, commercial, and educational growth within the area while remaining consistent with the intent and objectives of the Town's Land Development Code and Comprehensive Plan.

Roadway improvements, utility capacity, stormwater infrastructure, and other public facility requirements will be evaluated through detailed traffic analyses, concurrency review, and engineered construction plans during development review phases.

Development of the project will occur in four (4) phases beginning in 2026, with each phase to be completed sequentially through final buildout in 2030.

#### **7.09.04 – Amendment of termination of a PUD**

Amendment or termination of a PUD. Once PUD approval is granted, all development within the PUD development site shall be in conformity with the approved master development plan. In the event a developer wishes to deviate significantly from the approved development pattern, he shall either submit an amended master development plan or apply for a conventional zoning classification through the normal rezoning process.

The addition to or removal of any tract or parcel from a PUD shall require an amendment to the master development plan. Any amendment, variation, or adjustment of a master development plan shall require approval according to the following:

1. *Major amendment.* Submission for review and approval by the planning and zoning board and the town commission.
2. *Minor amendment.* Submission for review and approval by the development director.

The development director shall determine whether a proposed master development plan amendment is a major amendment or a minor amendment. The determination shall be based on, but not limited to the following: Any substantial change to the MDP, including increase in

**Town of Dundee**  
**Town Commission Staff Report**  
**Estes PUD Major Amendment to Ordinance 15-05**

density, change in permitted uses, change in stormwater runoff characteristics, rearrangement of designated open space or recreation areas, change in traffic patterns and trip generation, or other similar changes shall be considered a major amendment to the plan; any proposed minor changes in configuration or similar changes shall be considered a minor amendment to the plan. The development director may, at his discretion, forward any application for plan amendment to one or more individual departments for review and recommendation both as to its classification as a major or minor amendment and as to whether it should be approved, approved with conditions, or denied. (Ord. No. 13-09, § 1(Exh. A), 12-10-13)

**DEVELOPMENT REVIEW COMMITTEE**

As stated in Section 7.09.04 of the LDC, The development director may, at his/her discretion, forward any application for plan amendment to one or more individual departments for review and recommendation both as to its classification as a major or minor amendment and as to whether it should be approved, approved with conditions, or denied. The development director did forward the application for PUD amendment as a major amendment and the DRC members have reviewed the application with specific regard to the codes and ordinances of the Town of Dundee and have given their approval.

DRC Team:

TOD Fire Chief- Chief Joseph Carbone

TOD Public Works Director-Johnathan Vice

TOD Utilities Director-Tracy Mercer

TOD Utilities Supervisor- Raymond Morales

TOD Development Director-Lorraine Peterson

TOD Consulting Engineering Firm- Rayl Engineering and Surveying, LLC

TOD Consulting Attorney- The Law Offices of Markeishia L. Smith, P.A.

**MOTION OPTIONS:**

1. I move the Planning and Zoning Board recommend **approval of Ordinance 26-09** to the Town Commission, a Major Amendment to PUD-MU 15-05, for Estes Grove Subdivision, a request by Heather Wertz of Absolute Engineering, Inc., amending the Master Development Plan, special conditions, adding parcels 272835-000000-023010 and 272901-000000-012000, moving the 15 acre school site and the 5 acre public use site from the eastside of Lake Mabel Loop Road to the westside of Lake Mabel Loop Road, adding project phasing, reducing the overall project density, redefining the lot layout and lot sizes per original PUD conditions, changes to the external access points, and adding the Welsh Road extension right-of-way dedication.

# Town of Dundee

## Town Commission Staff Report

### Estes PUD Major Amendment to Ordinance 15-05

2. I move the Planning and Zoning Board recommend **approval with changes of Ordinance 26-09** to the Town Commission, a Major Amendment to PUD-MU 15-05, for Estes Grove Subdivision, a request by Heather Wertz of Absolute Engineering, Inc., amending the Master Development Plan, special conditions, adding parcels 272835-000000-023010 and 272901-000000-012000, moving the 15 acre school site and the 5 acre public use site from the eastside of Lake Mabel Loop Road to the westside of Lake Mabel Loop Road, adding project phasing, reducing the overall project density, redefining the lot layout and lot sizes per original PUD conditions, changes to the external access points, and adding the Welsh Road extension right-of-way dedication.
  
3. I move the Planning and Zoning Board **recommend denial of Ordinance 26-09** to the Town Commission, a Major Amendment to PUD-MU 15-05, for Estes Grove Subdivision, a request by Heather Wertz of Absolute Engineering, Inc., amending the Master Development Plan, special conditions, adding parcels 272835-000000-023010 and 272901-000000-012000, moving the 15 acre school site and the 5 acre public use site from the eastside of Lake Mabel Loop Road to the westside of Lake Mabel Loop Road, adding project phasing, reducing the overall project density, redefining the lot layout and lot sizes per original PUD conditions, changes to the external access points, and adding the Welsh Road extension right-of-way dedication.

#### **ATTACHMENTS:**

Exhibit A-Location Map

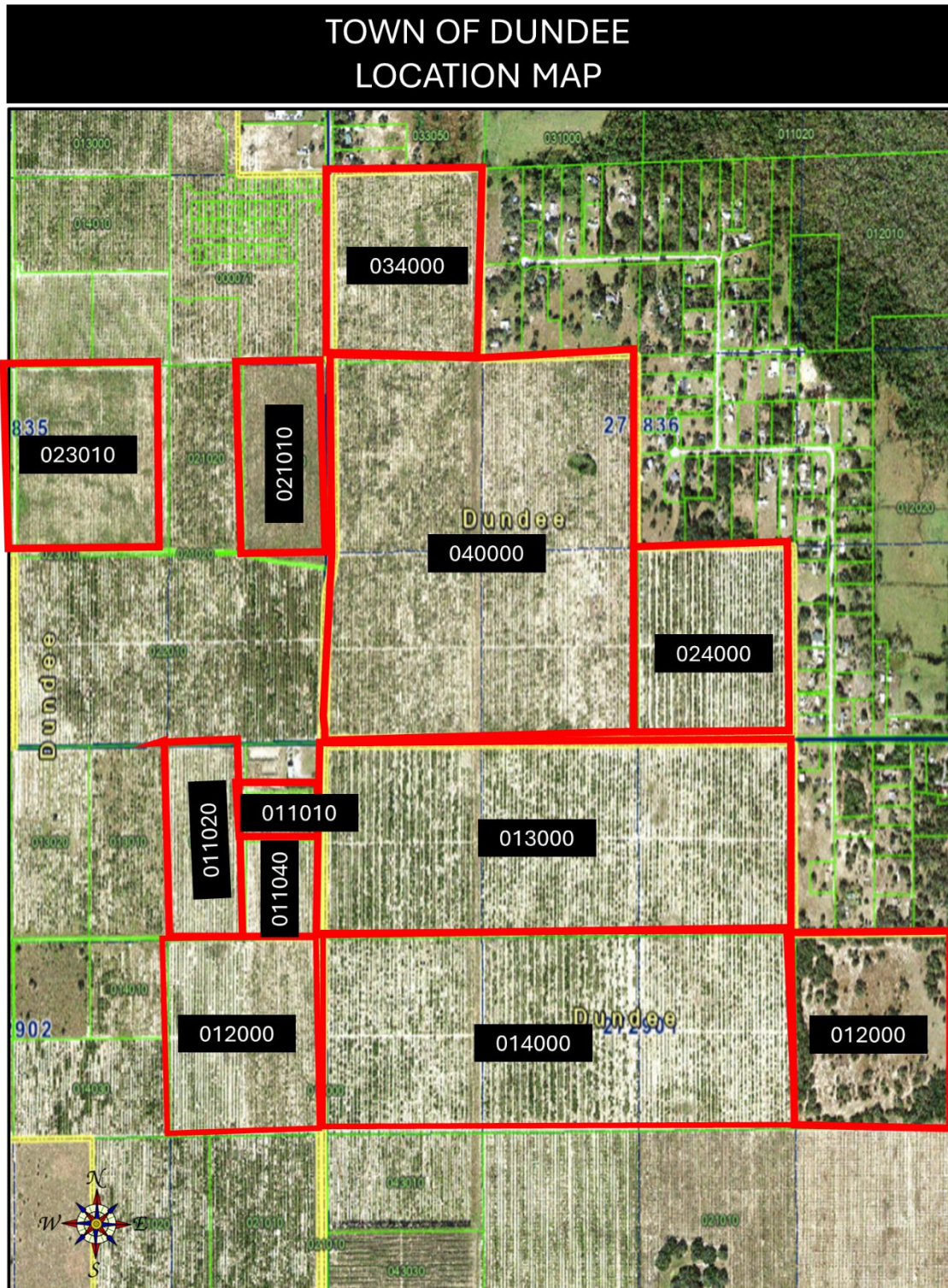
Exhibit B- Ordinance 15-05

Exhibit C-Amended Ordinance 15-05

Exhibit D-New Master Development Plan

Exhibit E- Applicant's Application

Town of Dundee  
Town Commission Staff Report  
Estes PUD Major Amendment to Ordinance 15-05  
Exhibit A-Location Map



Town of Dundee  
Town Commission Staff Report  
Estes PUD Major Amendment to Ordinance 15-05  
Exhibit B-Ordinance 15-05

ORDINANCE NO. 15-05

Page 1

ORDINANCE NO. 15-05

AN ORDINANCE AMENDING THE TOWN OF DUNDEE OFFICIAL ZONING MAP TO CHANGE THE ZONING FROM POLK COUNTY AGRICULTURE/RURAL-RESIDENTIAL (A/RR) TO PLANNED UNIT DEVELOPMENT-MIXED-USE (PUD-MU) ZONING CLASSIFICATION FOR A ±560.5 ACRE PROPERTY (10 PARCELS) LOCATED AT THE INTERSECTION OF LAKE MABEL LOOP ROAD AND CANAL ROAD; REPEALING ALL ORDINANCES IN CONFLICT HEREWITH; AND PROVIDING AN EFFECTIVE DATE.

**WHEREAS**, there has been a request for approval of a Master Development Plan for a Planned Unit Development (PUD) to be known as the Estes Grove PUD and to assign the zoning of the property described below; and

**WHEREAS**, the zoning change requested by the applicant is consistent with the Future Land Use Element of the Dundee Comprehensive Plan; and

**WHEREAS**, the applicant is working with the Polk County School Board to address school concurrency issues through the donation of up to 20 acres of land for a school site with potential co-location of a neighborhood park, which will count towards the open space/recreation requirements for the project; and

**WHEREAS**, the Town Commission of the Town of Dundee held meetings and hearings regarding the parcels show on Exhibit "A", with due public notice having been provided, to obtain public comment, and considered all written and oral comments received during public hearings, including supporting documents; and

**WHEREAS**, in exercise of its authority, the Town Commission of the Town of Dundee has determined it necessary to amend the Official Zoning Map to change the Town zoning classification assigned to these properties.

**NOW, THEREFORE**, be it enacted by the Town Commission of the Town of Dundee, Florida:

**Section 1.** The official zoning map of the Town of Dundee is amended so as to change the Town zoning classification from Polk County Agriculture/Rural-Residential (A/RR) to Planned Unit Development (PUD) on approximately ±560.5 acres of land located at the intersection of Lake Mabel Loop Road and Canal Road, as shown in Exhibit "A".

Town of Dundee  
Town Commission Staff Report  
Estes PUD Major Amendment to Ordinance 15-05

**ORDINANCE NO. 15-05**

Page 2

**Section 2.** The Master Development Plan-General (MDP-General) for this Planned Unit Development attached hereto as Exhibit "B" is approved in accordance with Article 2.02.03 of the Unified Land Development Code of the Town of Dundee for the total property known as the Estes Grove PUD, including additional special conditions all of which are attached hereto as Exhibit "C" and made a part hereof. Said property is hereby zoned Planned Unit Development-Mixed-Use (PUD-MU) Zoning District and the provisions of Article 2.02.03 and special conditions attached hereto shall govern further public review and development of the property within this District.

**Section 3.** All other ordinances or parts of ordinances in conflict herewith are hereby repealed.

**Section 4.** If any provision or portion of this Ordinance is declared by any court of competent jurisdiction to be void, unconstitutional, or unenforceable, then all remaining provisions and portions of this Ordinance shall remain in full force and effect.

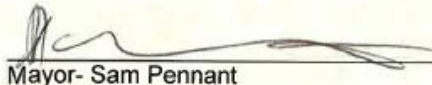
**Section 5.** The effective date of this ordinance shall coincide with the effective date of the companion Future Land Use amendment Ordinance 15-04.

**Section 6.** This Ordinance shall be codified in the Code of Ordinances of the Town of Dundee, Florida. A certified copy of this enacting ordinance shall be located in the Office of the Town Clerk of Dundee. The Town Clerk shall also make copies available to the public for a reasonable publication charge.

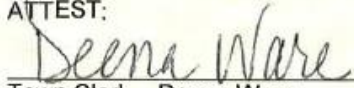
INTRODUCED on first reading this 10<sup>th</sup> day of March, 2015.

PASSED on second reading this 9<sup>th</sup> day of June, 2015.

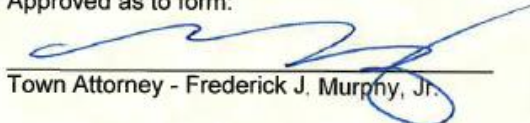
**TOWN OF DUNDEE, FLORIDA**

  
Mayor- Sam Pennant

ATTEST:

  
Town Clerk – Deena Ware

Approved as to form:

  
Town Attorney - Frederick J. Murphy, Jr.

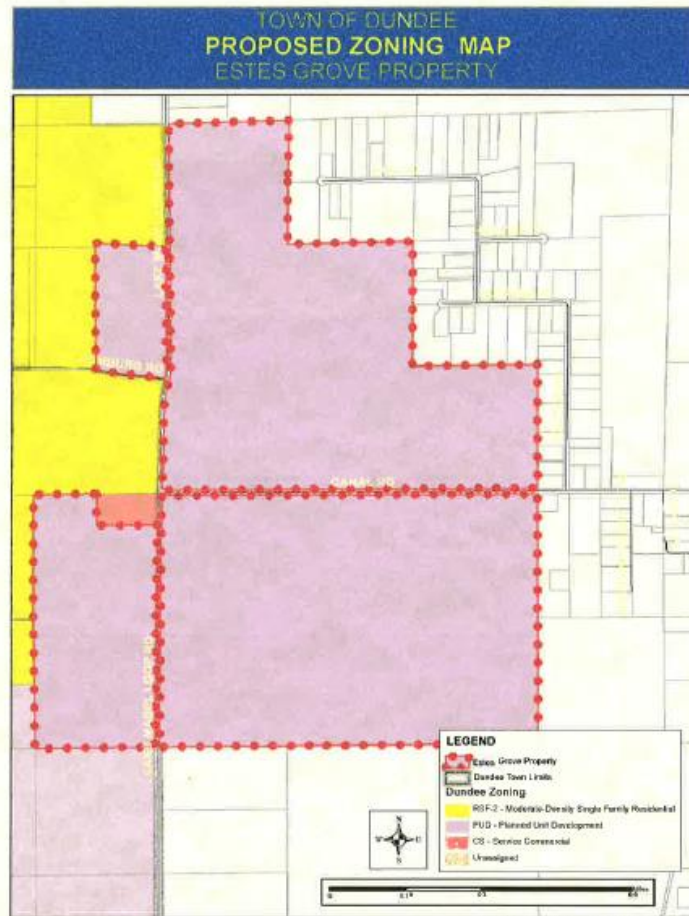
# Town of Dundee Town Commission Staff Report Estes PUD Major Amendment to Ordinance 15-05

ORDINANCE NO. 15-05  
Page 3

## Ordinance No. 15-05 Composite Exhibit "A" Legal Description and Zoning Map Page 1 of 1

Parcels:

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272836000000040000,	272901000000013000,	272901000000014000,
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Town of Dundee  
Town Commission Staff Report  
Estes PUD Major Amendment to Ordinance 15-05

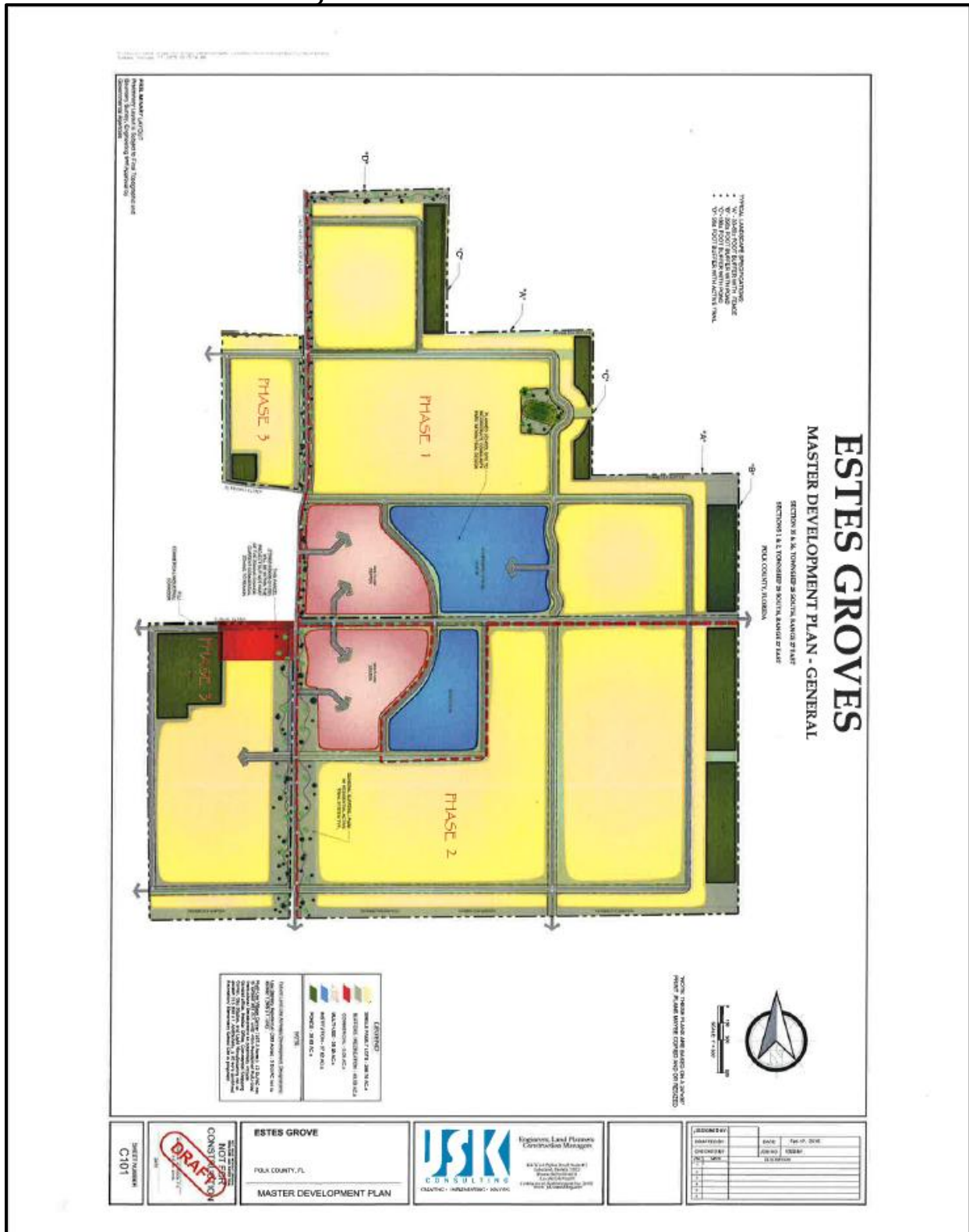
ORDINANCE NO. 15-05  
Page 4

Ordinance No. 15-05  
Exhibit "B"  
Estes Grove Master Development Plan-General  
Page 1 of 1

(See attached larger print for clarity)



# Town of Dundee Town Commission Staff Report Estes PUD Major Amendment to Ordinance 15-05



Town of Dundee  
Town Commission Staff Report  
Estes PUD Major Amendment to Ordinance 15-05

**ORDINANCE NO. 15-05**

Page 5

**Ordinance 15-05**  
**Exhibit "C"**  
**Estes Grove PUD Special Conditions**  
**Page 1 of 2**

1. As noted on the Master Development Plan-General, the project is restricted to the following development, based on the Future Land Use designations of the property:
  - a. Low Density Residential (393 acres): 5 du/acre not to exceed 1,965 single family units.
  - b. Multi-Use Village Center (167.5 acres)
    - i. 12 du/ac not to exceed 302 multi-family units
    - ii. Non-Residential Multi-Use/Institutional Development to potentially include General office, Medical Office, Commercial Shopping Center, Gas Station, and Light Manufacturing not to exceed 315,000 s.f.
    - iii. A 20-acre combined Recreation/ Elementary School Site
2. The applicant/developer shall provide water and wastewater connections to the site.
3. At time of Detailed Master Development Plan and/or site plan, the applicant shall complete a more detailed traffic analysis.
4. Development-required transportation infrastructure improvements will be determined at time of detailed transportation study and site plan review.
5. At time of Detailed Master Development Plan and/or site plan, the applicant shall complete environmental studies, specifically related to sand skinks and gopher tortoises.
6. The applicant shall complete a Detailed Master Development Plan and Site Plan prior to any development.
7. The applicant shall address school impacts prior to approval of a Detailed Master Development Plan.
  - The applicant will donate up to 20 acres to provide an elementary school site. A portion of this site will serve as a co-location for a neighborhood park.
  - This site will be transferred to the PCSB ownership during the construction and at time of final plat for Phase 1 of the development.
  - The School Board shall have final determination as to whether the site proposed for donation is a viable site for the construction of a school. The approval shall be based on size, configuration and environmental factors associated with the proposed site

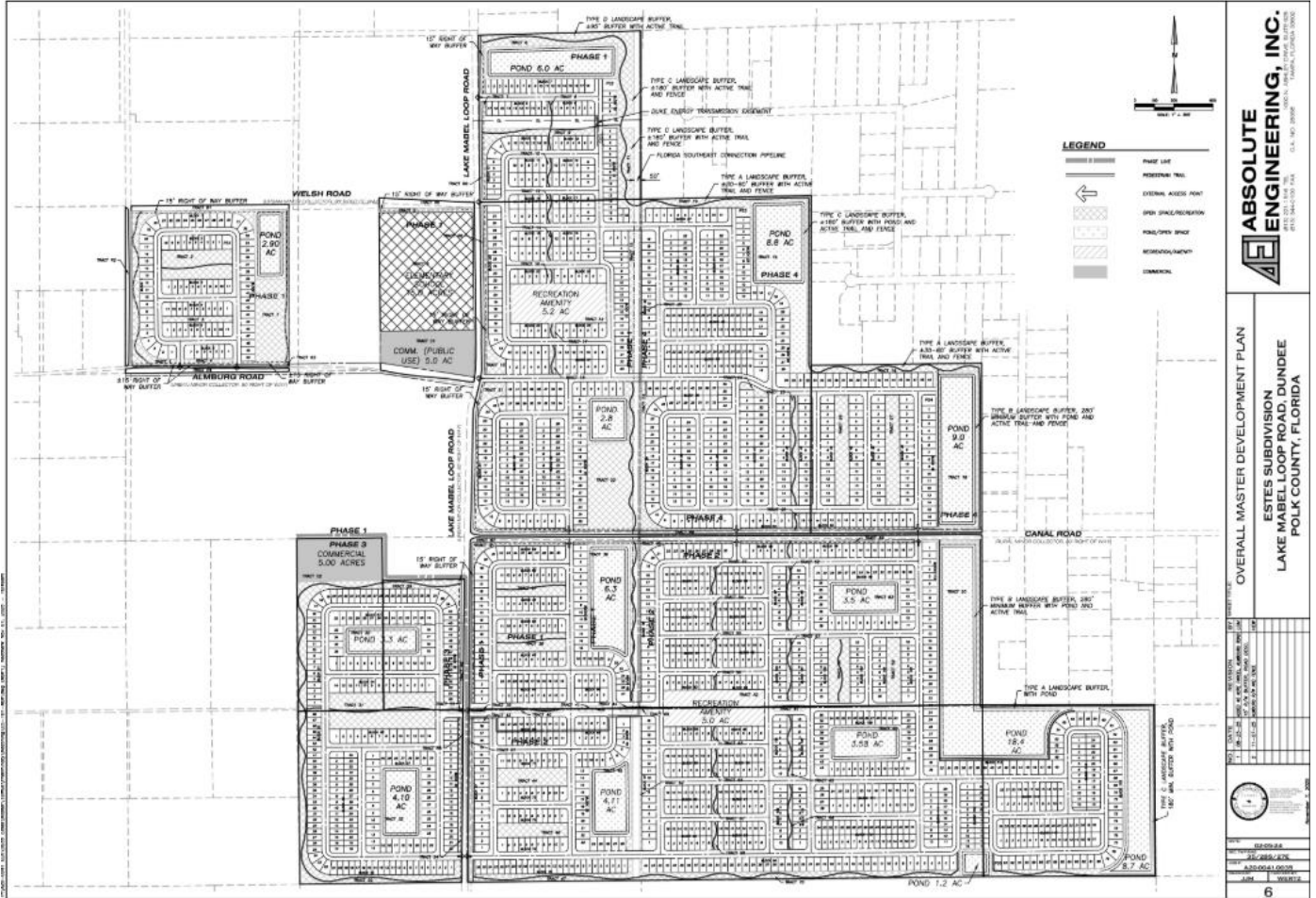
Town of Dundee  
Town Commission Staff Report  
Estes PUD Major Amendment to Ordinance 15-05

**ORDINANCE NO. 15-05**  
Page 6

**Ordinance 15-05**  
**Exhibit "C"**  
**Estes Grove PUD Special Conditions**  
**Page 2 of 2**

8. The applicant shall provide perimeter buffers as illustrated on the Master Development Plan-General adjacent to the northern and eastern boundaries of the property to provide compatibility spacing from the existing residential development in unincorporated Polk County.
9. The applicant shall address the proposed Florida Southeast Connection pipeline prior to approval of a Detailed Master Development Plan.
10. The applicant shall provide a point of connection for off-site connectivity and access for future development at the southeastern corner of the property; specifically to parcel 272901-000000-012000.

# Town of Dundee Town Commission Staff Report Estes PUD Major Amendment to Ordinance 15-05 Exhibit D-New Master Development Plan



Town of Dundee  
Town Commission Staff Report  
Estes PUD Major Amendment to Ordinance 15-05



***Town of Dundee***

0000 • 0202 E. Main Street • PO Box 1000 • Dundee, Florida 33838 • (863) 438-8330 • Fax (863) 438-8338

**Application for Planned Unit Development (PUD) Zoning and Master  
Development Plan Approval** (FORM 0204)

**Applicant**

The following information is required for submission of an application for a Planned Unit Development (PUD) zoning district and Master Development Plan for the Town limits of Dundee, Florida. **Please print or type the required information below. Attach three copies of the current survey of subject property along with an aerial photograph and location map and all requirements as outlined in the Land Development Regulations.**

Name of Property Owner: Cassidy Land Development, LLC

Mailing Address: 346 E. Central Ave., Winter Haven, FL 33880 Phone: (863) 324-3698

Name of Representative, if applicable: Heather E. Wertz

Mailing Address: 1000 N. Ashley Dr., Suite 925; Tampa, FL 33602 Phone: (813) 221-1521

Reason for Request: Major modification to PUD - See Project Narrative for details

**Property Identification**

Property Address or General Location: SW side of the Town of Dundee, W of Lake Pierce & E of Lake Annie

Present Use of the Property: Citrus Groves

Existing Structures Located on the Site: None

Total Acreage: 638.76 Number of Residents on Site: -0-

Parcel I.D.#: See attached listing

Legal Description of the Property: See attached listing

Range: \_\_\_\_\_ Township: \_\_\_\_\_ Section: \_\_\_\_\_

Subdivision: Estes Property

**Planning and Zoning Information**

Current City Future Land Use Designation: Low Density Residential (LDR)

Current City Zoning Classification: RSF-3

Note: An application fee will be assessed on all requests for land use and zoning changes in accordance with the most recent Resolution of the Dundee Town Council establishing such fees.

Date Received: \_\_\_\_\_ Received By: \_\_\_\_\_ File #: \_\_\_\_\_

Amount Paid: \_\_\_\_\_ Check #: \_\_\_\_\_ Receipt #: \_\_\_\_\_

# Town of Dundee Town Commission Staff Report Estes PUD Major Amendment to Ordinance 15-05

Town of Dundee  
page 2

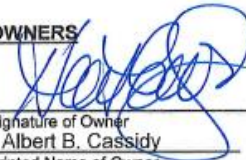
Planned Unit Development (PUD) Application

**OWNER'S SIGNATURE PAGE**

(I) (We), Cassidy Land Development, LLC being duly sworn, depose and say that (I) (we) own one or more of the properties involved in this petition and that (I) (we) authorize the Town of Dundee to process this petition for Re-zoning and/or Comprehensive Plan Amendment, in accordance with all adopted Town rules and regulations, and in conformance with State law.

Further (I) (we) or any agent or lessee of the subject property authorized by (me) (us) to file this petition, deposes and say that the statements and answers contained in the application and any information attached thereto, present the arguments in behalf of this petition to the best of (my) (our) ability; and that the statements and information referred to above are in all respects true and correct to the best of (my) (our) knowledge and belief.

**OWNERS**

  
\_\_\_\_\_  
Signature of Owner  
Albert B. Cassidy  
Printed Name of Owner

\_\_\_\_\_  
Signature of Owner  
\_\_\_\_\_  
Printed Name of Owner

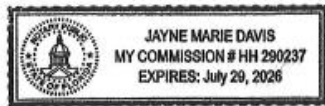
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Printed Name of Owner

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Signature of Owner  
\_\_\_\_\_  
Printed Name of Owner

STATE OF FLORIDA  
COUNTY OF POLK

**OWNER'S NOTARIZATION**

The foregoing instrument was acknowledged before me this 28th day of August, 2025, by Heather E. Wertz, who is personally known to me or who has produced a driver's license as identification and who did not take an oath.



  
\_\_\_\_\_  
Notary Public  
Notarial Seal and Commission  
Expiration Date

(FORM 9204)

# Town of Dundee Town Commission Staff Report Estes PUD Major Amendment to Ordinance 15-05

Town of Dundee  
page 3


Planned Unit Development (PUD) Application

**AGENT, LESSEE, OR BUYER'S SIGNATURE PAGE**

(I) (We), Heather E. Wertz being  
duly sworn, depose and say that (I) (we) serve as agent for the owner(s)  
(agent or lessee)  
in making this petition and that the owner(s) (has) (have) authorized (me) (us) to act in this  
capacity.

Further, (I) (we) depose and say that the statements and answers herein contained and other  
information attached hereto present the arguments in behalf of the petition herein requested to  
the best of (my) (our) ability and that the statements and information above referred to are in all  
respects true and correct to the best of (my) (our) knowledge and belief.

**AGENT, LESSEE, OR BUYER(S)**

  
Signature of Agent, Lessee, or Buyer(s)  
Heather E. Wertz, as agent  
Printed Name of Agent, Lessee, or Buyer(s)

\_\_\_\_\_  
Signature of Agent, Lessee, or Buyer(s)  
\_\_\_\_\_  
Printed Name of Agent, Lessee, or Buyer(s)

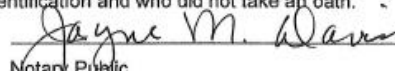
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Signature of Agent, Lessee, or Buyer(s)  
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Signature of Agent, Lessee, or Buyer(s)  
\_\_\_\_\_  
Printed Name of Agent, Lessee, or Buyer(s)

STATE OF FLORIDA  
COUNTY OF POLK

**AGENT, LESSEE, OR BUYER(S) NOTARIZATION**

The foregoing instrument was acknowledged before me this 28th day of August,  
2025, by Heather E. Wertz, who is personally known  
to me or who has produced a driver's license as identification and who did not take an oath.

  
Notary Public  
Notarial Seal and Commission  
Expiration Date



(FORM 9204)