

GENERALIZED DEVELOPMENT PLAN - NARRATIVE

Applicant: Bonaventure Investments, LLC
2700 South Quincy Street, Suite 500, Arlington, VA 22206

Applicant/Owner: KW COMMERCIAL, LLC
1304 Washington Avenue, Fredericksburg, VA 22401

**** (Applicant & Applicant/Owner are hereafter known collectively as the “Applicant”) ****

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Project Name: “Aspire at Lee’s Hill”

Property: Spotsylvania County Tax Parcel 36-17-FF, consisting of approximately 13.69 acres, known as 0 Spotsylvania Avenue (collectively, the “Property”)

Date: October 10, 2019

GDP: Generalized Development Plan, entitled “Aspire at Lee’s Hill”, prepared by Fairbanks & Franklin, dated July 1, 2019, as last revised, attached hereto as Exhibit A (“GDP”)

Rezoning Request: From C-2 & C-3 to MU-4

Rezoning File No.: R19-0010

1. Project Overview

The Applicant proposes rezoning the Property from the Commercial 2 District (“C-2”) and Commercial 3 Highway District (“C-3”) to the Mixed Use Low District (“MU-4”). Section 23-6.28.1 of the Spotsylvania County (“County”) Zoning Ordinance states that the purpose of the MU zoning district is to create “a flexible approach to development, to include infill and redevelopment, by allowing a variety of interrelated and compatible commercial, office, residential, civic, recreational, and entertainment uses in a pedestrian-oriented neighborhood setting based on, but not limited to the following principles:

- (1) Connectivity of road networks, including connectivity of new local streets with existing local streets;

- (2) Connected pedestrian networks and pedestrian-friendly road design;
- (3) Reduced front and side yard building setbacks;
- (4) Mixed-use neighborhoods, including mixed housing types; and
- (5) Respects the character of adjacent properties and surrounding neighborhoods. ”

The MU-4 sub-district is “a mixed use district that permits retail, office and residential uses in a variety of building types up to four (4) stories in height. Residential configurations include attached houses, townhouses, and apartments on upper floors of mixed use buildings.”

The purpose of the proposed rezoning is to allow an age-restricted residential development consisting of no more than fifty (50) new single-family attached dwelling units (“SFA”), one hundred forty-six (146) multi-family dwelling units (“MF”) with a restaurant on the first floor, plus additional commercial uses authorized under the MU-4 district, all as generally shown on the GDP. The MU-4 district includes single-family attached and multi-family dwellings as permitted uses, along with retail and office uses.

The GDP reflects a minimum of 15% open space (2.05 acres), which meets the 15% open space minimum per single family attached lot and the 10% open space minimum for the multi-family and commercial required for the MU-4 district. Open space will be used for active and passive recreation and buffering. Further, the rendering attached hereto and marked as Exhibit B depicts the proposed general architectural design and building material features for the MF building (“Rendering”).

As described in more detail below under Section 3 of this narrative, the Applicant’s proposal conforms to the policies established by the County’s Comprehensive Plan dated November 14, 2013, as last updated May 22, 2018 (the “Comp Plan”). Furthermore, the proposal will result in minimal impacts on public facilities and services, and impacts, if any, related to roads, fire rescue and parks will be offset through improvements and cash proffers. Since the residential component of this project is age restricted, there will be no impact to schools. In this regard, we have included with this application (as discussed in more detail below) a proffer analysis prepared by MuniCap, Inc., which is entitled “Lee’s Hill Spotsylvania County, VA SB 549 Proffer Analysis”, dated October 2, 2019, as may be revised, attached hereto and marked as Exhibit C (“Proffer Analysis”) and a proffer statement, which reflects the findings in the Proffer Analysis.

The Applicant also conducted a traffic impact analysis, which was prepared by Ramey Kemp & Associates, Inc., dated October 8, 2019, and entitled “Lee’s Hill – Traffic Impact Analysis (TIA) Spotsylvania County, Virginia”, which is attached hereto, marked as Exhibit D, and described in more detail below (“TIA”).

In addition, MuniCap, Inc. performed a fiscal impact analysis of the project (“FIA”). The FIA, dated October 10, 2019, and entitled “Lee’s Hill Spotsylvania County, VA Fiscal Impact Analysis”, is attached hereto and marked as Exhibit E, and included with this application. The FIA, as described in more detail below, provides that the project will generate (onsite and offsite) positive net tax benefits of over \$434,845 on an annual basis.

2. Project Location

The Project will be developed on one (1) parcel of land, totaling approximately 13.69 acres. The Project is situated in the Lee Hill magisterial and voting districts. The Project is located along Spotsylvania Avenue at the intersection with Market Street, within the Airport Protection Overlay District. The Property is bordered on the west by Spotsylvania Avenue and across the road is commercial including a restaurant and medical offices, all zoned C-3. To the east of the Project is a single-family detached subdivision known as “The Meadows,” zoned R-1. To the north is commercial development including the Weis shopping center, zoned C-2 & C-3. To the south the Property is bordered by Market Street and Goodwill, zoned C-2. Across Market Street is TownePlace Suites and Lee’s Hill ER, zoned C-2 & C-3.

Given all of the above, the Applicant’s proposal is compatible with existing uses in the area and will enhance the area’s housing stock while maintaining the area’s character and enhance additional commercial uses in this corridor. Additionally, the Applicant’s proposal is in line with the Comprehensive Plan (as described below) and the purpose of the MU district which is to provide “a flexible approach to development, to include infill and redevelopment, by allowing a variety of interrelated and compatible commercial, office, residential, civic, recreational, and entertainment uses in a pedestrian-oriented neighborhood setting.”

2.1 Site Access

Primary access to the Project Site will be provided via Market Street plus a shared entrance off Spotsylvania Avenue with the Weis shopping center, all as shown on the GDP. All site access locations will be coordinated with Spotsylvania County and the Virginia Department of Transportation. Please refer to the GDP for a depiction of site access location.

2.2 Environmental Characteristics

The Project’s design will minimize the impact to the existing topography of the Property. There are no streams, wetlands or RPA within the Project. The Applicant will perform all applicable studies for endangered species as is typically necessary for state and federal permitting for the project prior to final site plan approval.

2.3 Cultural and Historic Resources

Based on review of the Comp Plan and information from the Virginia Department of Historic Resources, the Property does not have any cultural resources, including cemeteries. Additionally, the Property is not located in the County’s Historic Overlay District.

3. Planning and Zoning

3.1 Zoning District and Ordinance

The Project Property is currently zoned Commercial 2 (C-2) and Commercial 3 Highway (C-3). The surrounding parcels are also zoned C-2 and C-3 with R-1 zoned parcels to the east. The Property currently has access to water and sewer.

As mentioned above, the Property is within the Airport Protection Overlay District.

3.2 *Comprehensive Plan Analysis*

The County's Comp Plan's Future Land Use Map classifies the Property as part of the "Mixed Land Use" designation. The Mixed Land Use category is intended to provide for a variety of land uses in a compact, walkable community with a more dense development pattern. The Mixed Land Use category encompasses a variety of uses, including higher density residential development. The intensity of the development within the mixed-use category varies and includes smaller projects that are or will be integrated into a larger mixed use area. The Applicant wishes to develop the property as a MU-4 district for a mixed-use residential and commercial development. Thus, the Applicant's proposed development aligns with the County's future land use goals.

The County has outlined its goals for future development and land use in its Comp Plan, which is designed to encourage the most appropriate use of land, water, and resources within the County, consistent with citizens' interests. The Comp Plan supports development that promotes job creation and benefits the economy. Further, the County generally expects residential developments to pay for themselves and demonstrate that they will not have a significant impact on the existing infrastructure or resources. In this regard, the Applicant anticipates that single-family attached homes within the Project will average 1,500 to 1,800 sq ft and sell for mid to upper \$200s with the ability to choose options to get over \$300,000. In addition, the 146 unit senior housing facility will be of high quality and include attractive amenities fitting the needs of senior citizens. The senior building will be a service-enriched retirement community for seniors who are independent. The typical age of a new resident is 77-82 years old. Although they are able to take care of themselves, our residents are often selling their homes (downsizing) to live in a community where there are numerous amenities and group activities, and where they no longer have to maintain their home and cook all their meals. Our property is a rental community and does not require a "buy-in" like many retirement communities, which makes it very affordable to move in, or move out depending on lifestyle changes.

In further regard to the foregoing, the Project will generate new jobs within the County and positive tax revenues both onsite and offsite. The FIA, as described in more detail below, provides that the project will generate positive net tax benefits exceeding \$434,845, on an annual basis at full build-out. Thus, the development will promote the County's economic and positive tax generation goals.

Further, the proposed age restricted use will have a lesser impact to county services, especially schools. In addition, the residents of this proposed project will typically not travel during peak am and pm travel hours (e.g. average age of resident living with age restricted communities is typically of retirement age of 65 years or older), thus minimizing impacts to the immediate

transportation corridors. Further, the proposed use will improve and offer an alternative housing stock in the immediate area.

This Project also addresses the following Guiding Principles and Policies as outlined in Chapter 1 of the Comp Plan:

- B. 2. b. Active adult communities, with their diminished impact on County services, should be supported.
- C. 1. The County should support a diverse housing inventory, providing a mix of units that can accommodate housing needs for all stages of life. This would involve a range of housing from affordable units for young families just entering the housing market in the form of condominiums, townhouses, and small single family homes to larger homes, and active adult and assisted care facilities.

For purposes of the above and this application, the proposed Project: (i) is already compatible with the existing uses in the area, providing a good transition; (ii) will enhance the area's housing stock while maintaining the area's character; (iii) will provide pedestrian interparcel connections; and (iv) as noted is fiscally positive and will help support the retail and commercial businesses in the immediate area.

Specifically, the proposed Project meets the following Mixed Land Use policies:

1. Mixed land use developments should display characteristics that provide a unique sense of place (examples could include: design guidelines, architectural features, or common color palette, among others).

Our proposed development is heavily invested in creation of a “sense of place” as the primary community in the area for senior living. Although the community is available for residents that are younger seniors and encourages an active lifestyle, the average resident age will be around 80. The expectations of our residents and the services offered will make our property a destination within the area. The organization of the main building embraces a large landscaped activity plaza with resident garden plots, activity lawns, outdoor eating opportunities and walking paths around and throughout the core plaza, building and connecting into the remaining townhome community and adjacent commercial development. The paths and landscape palette will be coordinated to provide a consistency in plant materials and node features with common benches throughout. Interior amenity offerings are abundant in the senior rental building as well.

The buildings will have a similar color palette and will integrate complementary roofing, siding and coordinated accent colors. Site lighting, street lighting and landscape palette will also be coordinated throughout the development.

Our complementary design illustrates the aesthetic qualities of the development, but the “sense of place” is also established in creating a lasting senior community with high occupancy, resident retention, and home sales.

2. Appropriate transitions in scale of building and/or buffering should be provided from mixed land use developments to adjoining existing developments.

The project will consist of new housing surrounded by commercial development and vacant land. The new buildings' heights will conform to the applicable County zoning ordinance requirements. The project will also include adequate set-backs and buffering in the areas shown on the GDP.

3. Vehicular and pedestrian connections should be made to adjoining developments at appropriate locations, including at existing interparcel access points.

The Project will provide primary vehicular and pedestrian connections with Market Street. Vehicular and pedestrian connections will also be made to the adjoining Weis shopping center property, as shown on the GDP.

5. The County should support public open space and pedestrian accommodations integrated throughout the development.

Project will provide open space to include onsite active and passive recreational amenities and pedestrian accommodations, all as shown on the GDP.

6. Mixed Use developments should be designed so that multiple vehicle trips can be combined into one stop by providing several destinations within easy walking distance. This can be encouraged by closely monitoring the provision of parking and ensuring that there is not an excess supply that encourages additional auto trips. Drive-throughs should be limited and carefully designed to ensure integration into the character of the development.

By providing residential housing, a restaurant and additional commercial on the Property, residents can walk between uses and not need to make multiple vehicle trips. In addition, there will be pedestrian access to adjoining commercial uses, including the Weis shopping center.

9. The County should support a diverse housing mix with a range of housing sizes and types that meet the needs of citizens throughout all stages of life and income levels.

The project contributes to a diverse housing mix in an area ripe for redevelopment and infill development by providing new age-restricted attached single-family homes and senior apartments, as encouraged by the Comp Plan.

10. Quality open spaces should be integrated into developments and may include passive and active areas, pavilions, walking paths, gardens, forested areas, and lakes, among other features.

The project will include open space with amenities to include outdoor patio, garden beds, fire pit, a pergola and open/activity lawns.

The Property is also located within the County’s Primary Development Boundary (“PDB”), which is the area within the County that is intended for future higher-density residential growth. The Comp Plan states that public water and sewer will be provided to properties within the PDB. Thus, the proposed rezoning from C-2 and C-3 to MU-4 is consistent with the goal of locating higher-density residential growth within the PDB, as well as the Property’s utilization of public utilities.

The County’s Transportation Plan seeks to maintain an efficient transportation system using available and expected resources, while maintaining functional and effective transportation systems that keep pace with future growth. Policies include (1) maintaining acceptable levels of service on public roads; and (2) ensuring that new development does not degrade levels of service and mitigates its impact on the transportation network through ensuring connections within and between developments that offer alternative routing of traffic. The Thoroughfare Plan does not list any planned road improvement project in the immediate vicinity of the Property.

The Project aligns with the County’s transportation goals, as it will not further degrade the current transportation level of services. Roads constructed within the project will be private and the expected daily trips will not degrade the level of services at applicable intersections.

As noted above, the Applicant did perform a TIA. The following intersections were reviewed:

- Mine Road at Spotsylvania Avenue / Falcon Drive
- Spotsylvania Avenue at Weis Market Shopping Center Driveway / Office Park Driveway
- Spotsylvania Avenue at Market Street
- U.S. 1 at Market Street
- U.S. 1 at I-95 Northbound Ramps

Based on the traffic capacity analysis, the following roadway improvements are recommended to accommodate the projected 2024 traffic conditions:

Spotsylvania Avenue at Market Street:

- Construct a southbound right-turn lane on Spotsylvania Avenue with 100 feet of storage.

As noted above, the introduction of a new, more modern age-restricted home stock to this location is consistent with the Comp Plan as it will promote a more diverse housing inventory in this area. In addition, the proposed use will also allow aging adults within the County and immediate area to downsize their current residences, and remain in the County or area, thus allowing them to remain close to family members, services and their communities. Therefore, we believe the Comp Plan’s future land use policies support the proposed use of a mixed use age-restricted residential plus commercial development at this location all as provided above.

3.3 Community Meeting

As part of the Rezoning Application process, Applicant attended a Pre-Application meeting with Spotsylvania County Staff on May 23, 2019. Additionally, Applicant and its representatives hosted a Community Meeting for the Project on June 26, 2019 at Fredericksburg Academy to

introduce and discuss the project with surrounding property owners. We addressed questions from members of our community and Exhibit F attached hereto provides a list of attendees.

4. Construction

Applicant anticipates close collaboration with Spotsylvania County during the permitting process to identify and manage environmental conditions and design criteria specific to the Project. The existing retention ponds constructed with the overall development of Lee's Hill commercial center will be used to satisfy water quality and quantity requirements.

Should the County approve this rezoning request, construction is anticipated to begin within a year of approval. The Applicant anticipates that the Project will be fully constructed within 3-5 years of any rezoning approval, subject to market conditions.

4.1 Site Preparation

The Property is currently undeveloped, but has been subject to previous land disturbance. Construction of the Project would begin with installation of erosion and sediment controls, and clearing and grading within the limits of construction.

4.2 Construction Workforce

The Applicant's goal is to retain local on-site workforce, which will consist of various skilled trades, supervisory personnel, support personnel, and construction management personnel.

Pursuant to the FIA, the Project is anticipated to generate an estimated 376 new jobs during the construction phase, and \$15,232,569 in new labor wages.

5. Public Facilities

5.1 Fire and Rescue

The proposal will have minimal impact on the County's fire and rescue facilities. The proposed roads and building setbacks will allow for adequate travel space within the project for emergency access to the improvements. Fire and Rescue Station 4, located less than 1 mile north of this site, will provide the Property with necessary emergency services. As detailed on the attached proffer statement, cash proffers will also offset any impacts the project may have on public safety facilities.

5.2 Schools

The Property is located in the Spotswood Elementary, Battlefield Middle and Massaponax High school districts. The proposed rezoning will not impact schools as no school aged children may reside within the Project, and therefore no cash proffers will be offered.

5.3 Parks, Buffers and Open Space

Portions of the Property will be maintained as open space. The open space will be used for active and passive recreational amenities, as well as buffering. As detailed on the attached proffer statement, cash proffers will also offset any impacts the project may have on parks and recreation facilities.

All buffers, landscaping, and setbacks will be as generally provided on the GDP and will conform to the applicable Zoning Ordinance requirements.

5.4 *Water & Sewer*

The Property will be serviced by the existing 16” water line located along Spotsylvania Avenue. Applicant will relocate the existing 18” sewer line that runs through the Property to the rear (East) of the Property, as shown on the GDP.

5.5 *Transportation*

The Property abuts Spotsylvania Avenue, which is a 4 (four) lane public road classified as a major collector road and Market Street, which is a 2 (two) lane public local road. Access to the Property will be provided from Market Street plus a shared entrance off Spotsylvania Avenue with the Weis shopping center. Roads constructed within the project will be private.

The project will generate 1,438 vehicle trips on a daily basis, including 143 vehicle trips during the a.m. peak hour and 124 vehicle trips during the p.m. peak hour. As shown in the TIA, the proposed trip generation is less than what could potentially be constructed under by-right conditions (4,658 VPD, with 301 VPH a.m. and 367 VPH p.m.). A VDOT 527 analysis was not required for this project because the trip generation potential was below 5,000 daily trips.

6. **Housing**

The project will enhance the County’s stock of senior apartments, along with new, age-restricted single-family attached dwelling units in this area of the County.

The MF building will include 110 one-bedroom and 36 two-bedroom units and provide a care-free lifestyle for residents which includes onsite meals, housekeeping, programmed group activities, social outings, and options for in-home health care. The 1 bedrooms will be approximately 700 sq ft and the 2 bedrooms approximately 1,100 sq ft. Price points would be consistent with rates for independent living rental units at two other nearby retirement communities (Harmony at Falls Run and Chancellor's Village) and would average \$2,650-\$3,000 per month for 70% of the units, with remaining units higher than that. Because the rent may include additional optional services and access to various amenities as selected by each tenant, there is significant savings over other monthly living expenses and a considerable number of additional services (food, utilities, cable, entertainment, etc). The overall out of pocket monthly cost is close and the value proposition and sense of community at our property is significant.

Here are more details on how our senior housing community is different than regular apartments:

- Our property will have 17 staff members dedicated to the operation of the senior housing, compared to a typical multifamily property with 4 employees for a development of 133 units.
- The property will have an in house restaurant that is open to the public.
- Residents can elect to purchase an optional monthly meal plan with multiple dining options to provide variety to residents.
- All utilities, including trash removal, basic cable and wifi are included (except telephone)
- The property has its own transportation services for residents. There is a bus that accommodates residents for events and social outings as well as a car for one off trips such as doctors' appointments, etc.
- Residents can also elect to have weekly housekeeping.
- We may have a separate physical therapist office adjacent to our fitness center.
- Emergency "Pendants" (on the wrist or neck) are available upon request.
- We establish local partnerships to include:
 - a relationship with the Emergency and Outpatient Center at Lee's Hill run by Mary Washington Hospital.
 - relationships and hosting continuing education seminars with the medical community at Spotsylvania Regional Medical Center.
 - relationships with senior placement specialists, the fire department, medical personnel, and local community service programs.
 - scheduling service programs for our residents to volunteer in a variety of settings including county schools, hospitals, churches and libraries.

Additional features and amenities include: an indoor pool; fitness and wellness program; prescription delivery; hand rails along hallways; emergency pull cords in all bathrooms, preferred health care provider on-site; hair and nail Salon and spa; outside private garden area with raised planter beds; art studio; theater; library; meeting and game rooms; an outdoor patio with fire pit, gazebo, and dining areas; and entertainment, social and educational programs/events such as bingo, brain/card games, movie nights, book club, crafts class, etc.

With an anticipated average sales price for the SFA units of the mid to upper \$200s with the ability to choose options to get over \$300,000 and an approximate size of 1,500 to 1,800 sq ft, the proposal meets market expectations for this area of the County.

Further, the projected value for units should enhance surrounding property values. We believe that all parcels will be developed within 3-5 years of any rezoning approval (subject to market conditions).

7. Fiscal Impact Analysis

The FIA includes an analysis for revenue projections of the project at full build-out, both for on site development and off-site expenditures from residents of the project (see Exhibit E). The total revenue generated from the project was then compared with expected County costs to provide services to the residents of the proposed development.

For the new residential units at the site, the total real property tax resulting from the project is estimated to be about \$177,959 annually in current dollars. An additional \$76,162 annually in

real property tax is estimated to be generated from the commercial uses. The personal property tax resulting from the project is estimated to be \$99,181 annually in current dollars plus an estimated \$125,664 from commercial business property tax revenues. The sum of all of the on-site tax revenues that could be expected to flow to the County from the project annually after build-out is over \$572,533 each year in current dollars.

In addition to the on-site fiscal impact, the project is estimated to generate \$30,417 in taxes off-site for the County annually after build-out and occupancy. As mentioned above, the Project would generate approximately 376 new jobs during the construction phase, resulting in about \$15,232,569 in employee earnings. With the commercial uses, the Project would generate approximately 66 permanent jobs and \$1,884,179 in employees earnings.

The project is expected to result in 196 new households with an estimated 1.49 persons per household for a total of 292 people. The total annual tax-supported cost of the project is estimated to be \$168,106 each year in current dollars.

After considering the tax revenues generated by the project and the costs to the County resulting from the project, it is anticipated that this project will generate annually a net revenue surplus (onsite and offsite) after full build-out of \$434,845 in current dollars.

EXHIBIT A

Generalized Development Plan

EXHIBIT B

Rendering

EXHIBIT C

Proffer Analysis

EXHIBIT D

Traffic Analysis

EXHIBIT E

Fiscal Impact Analysis

EXHIBIT F

Community Meeting Attendees

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