



Wilderness Battlefield Gateway Study - Phase II

Finding Common Ground and a Preferred Development Plan

Orange County, Virginia

November 2012

Submitted To:

Friends of Wilderness Battlefield
Board of Supervisors, Orange County, VA
Piedmont Environmental Council
Lake of the Woods Association
National Park Service
Civil War Trust
National Trust for Historic Preservation
National Parks Conservation Association

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Wilderness Battlefield Gateway Study Phase II:
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I. Project Background

The *Wilderness Battlefield Gateway Study: Concepts for Preservation and Economic Development (Phase I report issued April 2012)* established a balanced conservation/development vision for lands on and around the historic Wilderness Battlefield and Route 3 corridor in eastern Orange County, Virginia. The study included an in-depth investigation of transportation, cultural resources, and economic development challenges and opportunities, and identified tools to facilitate conservation and development that can serve as a model for other communities with heritage resources.

The gateway study assessed existing land and economic conditions and employed a series of work sessions with landowners, governmental officials, preservation organizations, and other stakeholders to develop a common vision and recommend appropriate tools for balancing preservation and economic development objectives. Ultimately, the study advanced the land use planning and development direction for this significant gateway, and laid the foundation to encourage sensitive, proactive land use and development decisions.

The study resulted in three conceptual scenarios that incorporated the following recommended development patterns:

- *Conservation of Significant Environmental and Cultural Land* to create a protected framework for open-space and compatible outdoor recreation;
- *Mixed Use Traditional Village* set back from Route 3 to provide retail and support services for visitors and area residents with upper story residential uses;
- *Business Campus* adjacent to the village to accommodate larger businesses;
- *Hamlet Residential* outside of the village for future residential expansion (after the Village is built out); and
- *Design Guidelines* to improve the character of commercial development along Route 3.

In addition, the study provided detailed information in a matrix format about various land development tools for consideration and identified next steps, and funding opportunities for implementation.

II. Overview of Phase II Scope

Following release of the Phase I study, stakeholders met to establish the beginnings of the recommended “Partnership Roundtable,” identified as an important next step to facilitate further coordination and planning. Its first task was to envision a preferred development scenario that could be supported for further study, and be incorporated into the Orange County Comprehensive Plan.

Phase II of the *Wilderness Battlefield Gateway Study* commenced with an intensive two-day work session with the initial consulting team, project stakeholders, and invited experts to discuss model mixed-use economic development, conservation housing development, and Orange County utility infrastructure. The session established common discussion issues identified by the group, involved hands-on review of illustrated development concepts, and ended with narrative that summarized discussions, identified mutual points of consensus, and clarified important points needing further study. (This detailed summary narrative is included in the appendix.)

The recommendations of Phase II of the *Gateway Study* are discussed in the following sections. The initial and long-term initiatives for the Gateway Study Area will require continued study and collaboration among stakeholders and citizens of Orange County.

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III. Methodology

The consulting team worked with leading stakeholders to develop a methodology that would successfully engage other participants in reaching mutual support for a preferred development plan. Recognizing that the task to establish consensus is facilitated best through intensive shared dialog, a workshop was scheduled to enable concentrated discussion and sharing of information. The team established a discussion group with a manageable number of participants (12 or less) who represented the following groups: Friends of Wilderness Battlefield, Gateway Study Steering Committee, key property owners, Orange County officials, and Lake of the Woods residents.

A. Pre-Workshop Participant Survey

The consulting team identified in advance the critical issues to be discussed at the work session using a participant survey that focused on those topics most important to each stakeholder. The survey asked a series of probing questions to determine areas of agreement and issues needing more discussion:

- On what issues do you feel it is necessary to reach consensus?
- What issues are outside the scope of this exercise?
- What will constitute a win-win for you?
- What are your preferred locations for: a mixed-use village, business campus, preservation buffers?
- What advances in infrastructure do you believe are necessary to support responsible growth?

CONSENSUS

Identified common ground and direction that everyone agrees they can live with.

Consensus does not mean there is a unanimous opinion, or majority vote.

- *Where is there common ground that we can support moving forward?*
- *When addressing areas of disagreement – Use creative brainstorming – What are possible solutions and direction?*
- *“There are no winners or losers. agree to support.”*

Participants suggested the team present additional analyses and facilitate discussions on (1) water and waste-water infrastructure necessary for development; (2) updated economic modeling presented in the Phase I study; and (3) example development projects by experienced developers.

B. Two-Day Workshop

The consulting team facilitated a two-day workshop with participating representatives of the Partnership Roundtable. On the first morning, guest experts made presentations regarding asset-based and conservation-based development, water and wastewater infrastructure (including the 2010 Water Supply study), and mixed-use village and business campus economics. The balance of the workshop was devoted to discussing common ground topics, identifying points of consensus and defining a preferred plan. The group brainstormed the challenges and opportunities of each requested topic and discussed how well the three development scenarios created in Phase I addressed each topic. By the close of the workshop, the group established draft common ground points supported by a majority of participants, including specific items needing additional information or study. The group then defined the preferred development plan for the study area.

C. Common Ground, Points of Consensus and Conditions

With the help of the consulting team in the weeks following the workshop, the stakeholders drafted a more formal statement of common ground points from the roundtable discussion, providing additional clarifications and conditions. This detailed narrative document is included in the appendix and reflects over 40 points of discussion, including consensus points supported by the majority of stakeholders

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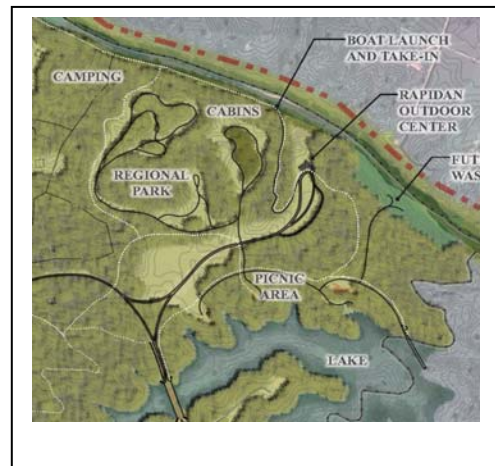
While varying opinions exist regarding how the plan may be implemented, participants supported advancement and continued exploration of the basic elements of the preferred plan.

IV. Preferred Wilderness Gateway Plan - Overview

The work sessions established a preferred development scenario by defining further the arrangement of development patterns recommended in Phase I of the Gateway Study. This Phase II study highlights both the long-range (50-year) and Initial Phase (20-year) build-out of the gateway study area, and illustrates how the use of recommended land planning tools may achieve the desired vision for the area. Although there was not consensus on every item, participating stakeholders advanced and supported the location of the following development (kit-of-parts) concepts recommended by the *Gateway Study*. The concepts are reflected on the accompanying *Wilderness Gateway Study Preferred Plan – Long Range* illustrative.

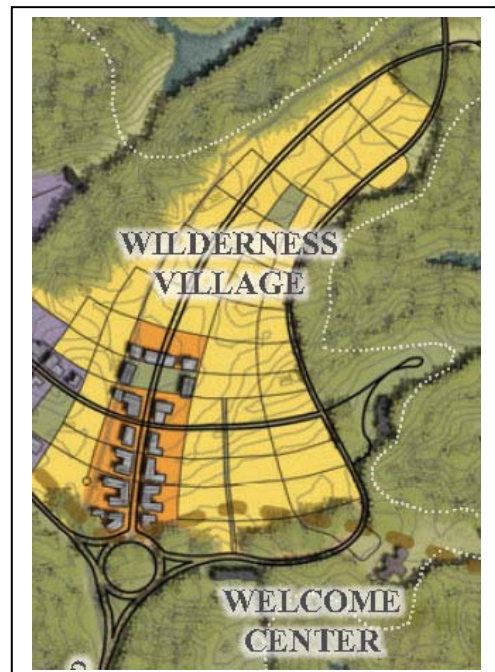
- *The Rapidan Recreational Crescent and Regional Park* buffers the Wilderness Battlefield from development encroachment and provides a recreational greenway along the Rapidan River extending west to Germanna.

- *Outdoor recreation components* are highlighted by a lodge and the Rapidan Outdoors Center, supported by a regional park that offers equestrian facilities, cabins, camp sites, boat launch and takeout, and greenway trail extending from Wilderness Battlefield to the Germanna Foundation Visitors Center, and other regional cultural sites.



- *A traditional Mixed-use Village* set back from Route 3, screened from view but near the battlefield will promote heritage tourism, access to outdoor recreation, and serve as a destination for commercial activity:

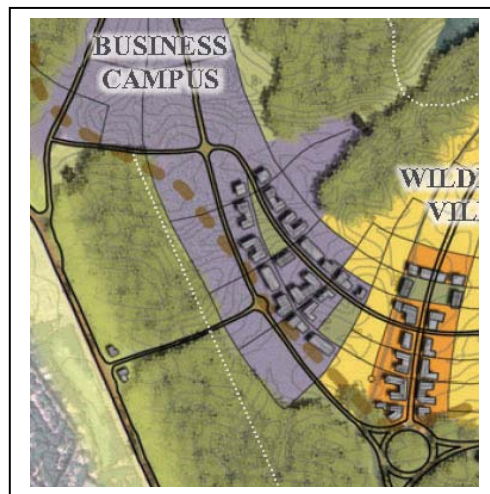
- *Village destination and community amenities* lie along a central main street including a welcome center, hotel and lodging, theater, village green, restaurants, farmers market, local food and wine retail, local goods and services..
- *Mixed uses of retail occupy the first floor* with residences, and office space above; economic studies by the consultant team suggest 205,000 square feet of retail may be supported in the village in the next 20 years.
- *Multi-family, and single-family village residential*, adds to the village density and will make possible the preservation of open



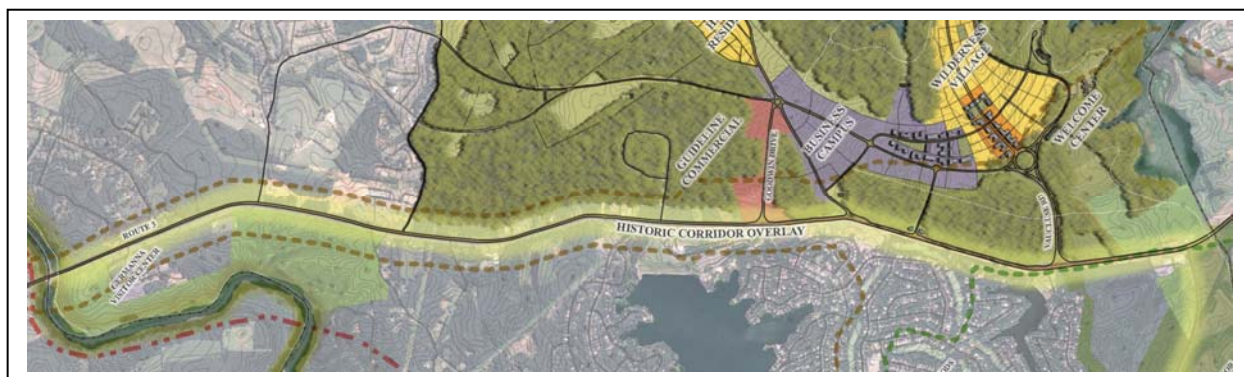
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space and protection of historic and natural resources; with an estimated 1,500 units over the first 20 years.

- *Business Campus* will be adjacent to the village and situated along a parallel road setback from Route 3, extending from the village west toward Goodwin Drive. The campus is envisioned to support future job-creation and economic development opportunities beyond the destination-retail and heritage tourism opportunities first established in the village. Expanding markets in health services, business and financial services, and agribusiness were identified as emerging markets for Orange County.



- *Scenic Lake* that may serve as a future water supply source for the region. There were diverse opinions on this feature, with respect to water quality and quantity yields and future growth demands. Further study was recommended to confirm feasibility of this potential water supply feature over time.
- *Future 'Hamlet' Residential* will provide clustered opportunities for expanded residential growth. These clusters are recommended only after the village is well established. Establishing incentives for *Residential Conservation Lots* may also provide for limited additional residential growth opportunities outside of the village that preserve rural character.
- *Parkway Entrance Road* from Route 3 will provide access to the village and amenities. The parkway-style road will depart Route 3, traveling north to the village, and into the regional park, while providing necessary access to future infrastructure improvements. There were diverse opinions on where the parkway should be placed along Route 3, citing the need for future study.
- *Corridor Overlay District* will provide design guidance and landscape buffering for new development and redevelopment along historic Route 3. Revised land development regulations will encourage enhanced setbacks, landscaping and improved signage for future development. The plan also makes modest provisions for additional *Guideline Commercial* development, once retail development is further established in the village.



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A. Phasing & Next Steps

The April 2012 *Wilderness Battlefield Gateway Study* provided a detailed matrix of next steps and potential funding opportunities for implementing the desired development patterns. Stakeholders have accomplished the first two priorities set forth as next steps by establishing the beginnings of a Partnership Roundtable and defining a preferred development plan.

While the Preferred Plan will require continued analysis, planning, and partnerships to implement (as described below), it is important to recognize that the development patterns described above must be phased in order to protect economic investment, sustain natural and cultural resources, and establish the sensitive balance and relationships of each supporting element of the plan. The illustrated *Preferred Plan – Phase I* demonstrates implementation of the following priorities (as prescribed by the Consultant Team):

- Infrastructure including roads and utilities, should be planned and scaled to meet the first phase of development.
- A mixed-use village should be established as the first and highest priority for development to establish substantial development mass for a community destination with identity and appeal.
- Density of commercial, office, and residential uses should be channeled first to the village, before other elements of the plan are established in order to ensure economic viability.
- The business campus should be located next to, and grow out of the village grid in order to take advantage of critical mass, and shared facilities.
- Recreational amenities and continued preservation initiatives should be established early and in tandem with development efforts to prevent the loss of significant resources and preservation/recreation opportunities.

The *Preferred Development Plan* and the recommendations of the Wilderness Battlefield Gateway Studies establish the foundation for further comprehensive planning, targeted development initiatives, and additional feasibility studies. The Preferred Development Plan and the two Wilderness Battlefield Gateway Studies should be integrated into the updated Orange County Comprehensive Plan. This will establish a balanced economic development-preservation framework for guiding future land development and growth patterns in eastern Orange County. As more detailed planning for the gateway corridor and area progresses, additional direction will be forthcoming for this special area rich in cultural meaning and economic opportunity.

end

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Appendix

Common Ground, Points of Consensus and Conditions

The following narrative provides a detailed discussion of the common ground topics, consensus points supported by a majority of participating stakeholders, and conditions/issues needing further study. These statements represent significant milestones, with over 40 points of common ground, consensus and conditions, furthering a shared vision for the Wilderness Battlefield Gateway. While there are still elements that need further study, the participating stakeholders have found substantial common ground that supports moving the Preferred Development Plan forward.

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I. Common Ground, Points of Consensus and Conditions

1. Rapidan Recreational Crescent

Establish a corridor of preservation and recreational opportunities (e.g. Rapidan Outdoor Center) extending from Wilderness Battlefield west along the Rapidan River that buffers the battlefield from development and provides public river access provided that:

- a. fair compensation is provided to land owners that considers (1) market value of the land in question (e.g. development potential, zoning, and any infrastructure improvements) and (2) owner's ability to develop more densely in other areas of the property or properties;
- b. both public and private recreational activities are explored (for revenue generation purposes);
- c. land management and operational responsibilities are established by an acceptable entity (e.g., Recreational Resources Authority appointed by the County) that provides guidance, oversight and consistency regarding applicable land conservation and development standards;
- d. there is coordination with other cultural and natural heritage groups (e.g. the Germanna Foundation, the National Park Service, others) to explore protection and linked connections to important facilities and historic and/or cultural resources;
- e. recreational offerings along the crescent, including possible trails, boating, camping, etc., are marketed as an amenity for residents, and a destination for visitors, and future employers;
- f. the corridor is represented in the County's Comprehensive Plan; and
- g. the recreation corridor is implemented in tandem with the development initiatives of the preferred plan, not as a stand-alone initiative.

2. Lake – Wilderness Run/Shotgun Hill Branch

Designate the impoundment of Wilderness Run and Shotgun Hill Branch on the plan as a lake, providing water supply for the Wilderness area and Orange County, provided that:

- a. there is continued study of the size, capacity, and phasing of the impoundment;¹
- b. there is coordinated discussion by Orange County officials with Spotsylvania County and Culpepper County officials on the Water Supply Plan and the recommendations of the Gateway Study;
- c. there is due diligence by Orange County to (1) ensure safe water quantity and quality yields for the subject impoundment;² (2) confirm that the Wilderness/ Shotgun Hill Branch location is the most suitable among the sites identified in the 2010 Water Supply Plan (3) prepare estimate of construction costs and address financial obligations for the impoundment facility, including treatment; (4) initiate next steps for permitting of the facility;
- d. development is consistent with and employs best management practices that include design standards and setbacks for limited development to protect public health and welfare as well as environmental quality; and
- e. unless and until the impoundment is constructed, land within the impoundment contours will be reserved as forested areas, meadows, floodplains, and streams.

3. Mixed-Use Village

Locate a mixed-use, "destination" village buffered from Route 3 as a center for commercial activity and as an entrance to recreational amenities, provided that:

¹ No consensus reached regarding water use projections and the resulting lake impoundment. Stakeholder comments included views that neither size nor capacity can be established as a point of consensus until further due diligence is conducted; Other comments requested the size and capacity not exceed levels of growth represented in the Wilderness Gateway Study, Phase I findings.

² Requests that due diligence address water quality concerns related to the possibility of residual source contamination including mercury, and other contaminants from past gold mining activities.

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- a. the village is sited on the topographic land peninsula north of Route 3, siting and buffering will consider setbacks from the potential lake impoundment, and the preservation of views from the Wilderness battlefield;
- b. transportation access to the village from Route 3 does not encroach upon significant battlefield features or vistas (e.g. resources near Vaocluse Road require special consideration)³;
- c. early phases of development emphasize mixed uses that serve visitors and residents alike including lodging, welcome center, restaurants, retail, and recreation-friendly business;
- d. village residential is focused to upper-floor uses and compact residential uses (single and multi-family approaching a minimum of 8 density units per acre), more specifically:
 - 1) develop incentives to encourage new residential development in the project area north of Route 3 into the mixed-use village, using appropriate land development/conservation tools;
 - 2) coordinate with willing landowners in the study area to develop incentives for existing undeveloped land and wetlands in the northwest section of the study area to be considered for large conservation lots (with a maximum density of 90 acres per unit, the average farm acreage in Orange County) designed to incorporate natural and cultural features;
 - 3) after critical mass is established in the village, residential development should begin outside the core village in the form of small hamlet residential clusters.

4. Business Campus

Establish a Business Campus that provides expanded opportunities for employment including the following provisions:

- a. as appropriate, smaller square-footage uses should be channeled to the village for ground floor retail, and 1st/ 2nd floor office;
- b. campus will be located within close proximity to the village (preferably within a five-ten minute walk);
- c. campus location will take advantage of access to open space as a marketable live-work-play feature, important to employers and residents alike;
- d. campus will be set back and buffered from Route 3, extending westward from the village toward Goodwin Drive;
- e. campus may include development options for business support services that meet established design and development standards; and
- f. phases of campus development should be established as a result of this study.

5. Route 3 Corridor

Establish design guidelines for the Route 3 corridor to enhance the visual integrity of the Gateway, and channel compatible growth to the Village and Business Campus as prescribed in Phase I of the Wilderness Gateway Study.⁴

³ No consensus reached regarding the entrance to the village. Stakeholder comments varied with requests that no entrance be placed east of Vaocluse Road, impacting views from Wilderness Battlefield, while others preferred entrance options further east, closer to Route 20. It was recommended that the item be tabled pending continued discussion among stakeholders with VDOT.

⁴ Stakeholders noted the need for specificity of design guidelines, beyond those outlined in Phase I of the Gateway Study. This task is identified in the Phase I report as an important priority for the County.

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6. Infrastructure Improvements:

Make provisions to designate suitable locations for utilities and transportation improvements based on the findings of the study and continued investigation. More specifically:

- a. regarding service access to land north of Route 3:
 - 1) establish easements for an infrastructure corridor extending from the village, west toward Goodwin Drive, serving both the village and business campus, providing utility right-of-ways and high-speed data facilities
- b. regarding water supply expansion, the following steps represent the typical prescribed approach. The County should establish a timeline and thresholds (based on due-diligence) that trigger the planning and implementation of the following regarding water supply and wastewater capacity expansion;
 - 1) perform a water treatment plant expansion study to increase treatment capacity (currently at 1.58 million gallons per day (mgd)) to the permitted withdrawal (3 mgd)
 - 2) if justified by the treatment plant expansion study, obtain a revised water treatment plant (WTP) permit for Wilderness WTP, and conduct expansion
 - 3) conduct a safe yield analysis of Wilderness Run/ Shotgun Hill Branch
 - 4) as population growth projections increase within the 30-40 year infrastructure plan, and if due diligence identifies the Wilderness Run/ Shotgun Hill Branch as the preferred impoundment site for this area of Orange County, begin pursuit of a new WTP and impoundment to meet future water needs
- c. identify potential location for future waste water treatment facility within Orange County

7. Other Coordination

In addition to the above points of consensus, the parties agreed that:

- a. The County is to develop and incorporate the necessary planning and development tools in a timely manner to facilitate the recommended development. These include:
 - 1) updating the comprehensive plan and the future land use map to reflect the recommendations of the Phase I and Phase II planning efforts;
 - 2) updating the zoning ordinance and subdivision ordinances to provide development provisions and standards for: mixed-use village, business campus, large-lot conservation subdivision, river corridor overlay, commercial corridor design overlay, and transfer of development rights;
 - 3) developing incentives to work with willing property owners to:
 - i. encourage transfer of potential residential development lots to the designated village, including consideration of appropriate un-built, platted lots in the study area, and those that would impact visitor experience or historic resources (program could consider density bonuses to encourage development in the most appropriate places and patterns).;⁵
 - ii. consider use of transfer of development rights for undeveloped, vacant but zoned commercial on Route 3 to channel commercial into the village or business campus
 - iii. once the village is well-established, offer incentives offering voluntary relocation of existing commercial development in visually or culturally important areas along Route 3, into the village or business campus.
- b. Provide project updates and outreach to key property owners, and neighboring county government, prior to additional public announcements
- c. All parties agree to discuss outstanding project issues as a group committed to finding reasonable, agreeable solutions supported by the representative stakeholders.

⁵ Stakeholders requested that Orange County staff and stakeholders continue to meet to further develop incentives

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II. Phase I Recommendations:

The points of consensus established during the consensus workshop and subsequent refinements by stakeholders, continue the recommendations of the *Phase I Wilderness Gateway Study*. This Phase II exercise identified points of common ground among stakeholders, and advanced the preservation and development patterns established in Phase I. The following items were established as recommendations in Phase I, but were not identified by respondents as priority agenda items for consensus early in the process. They deserve continued consideration.

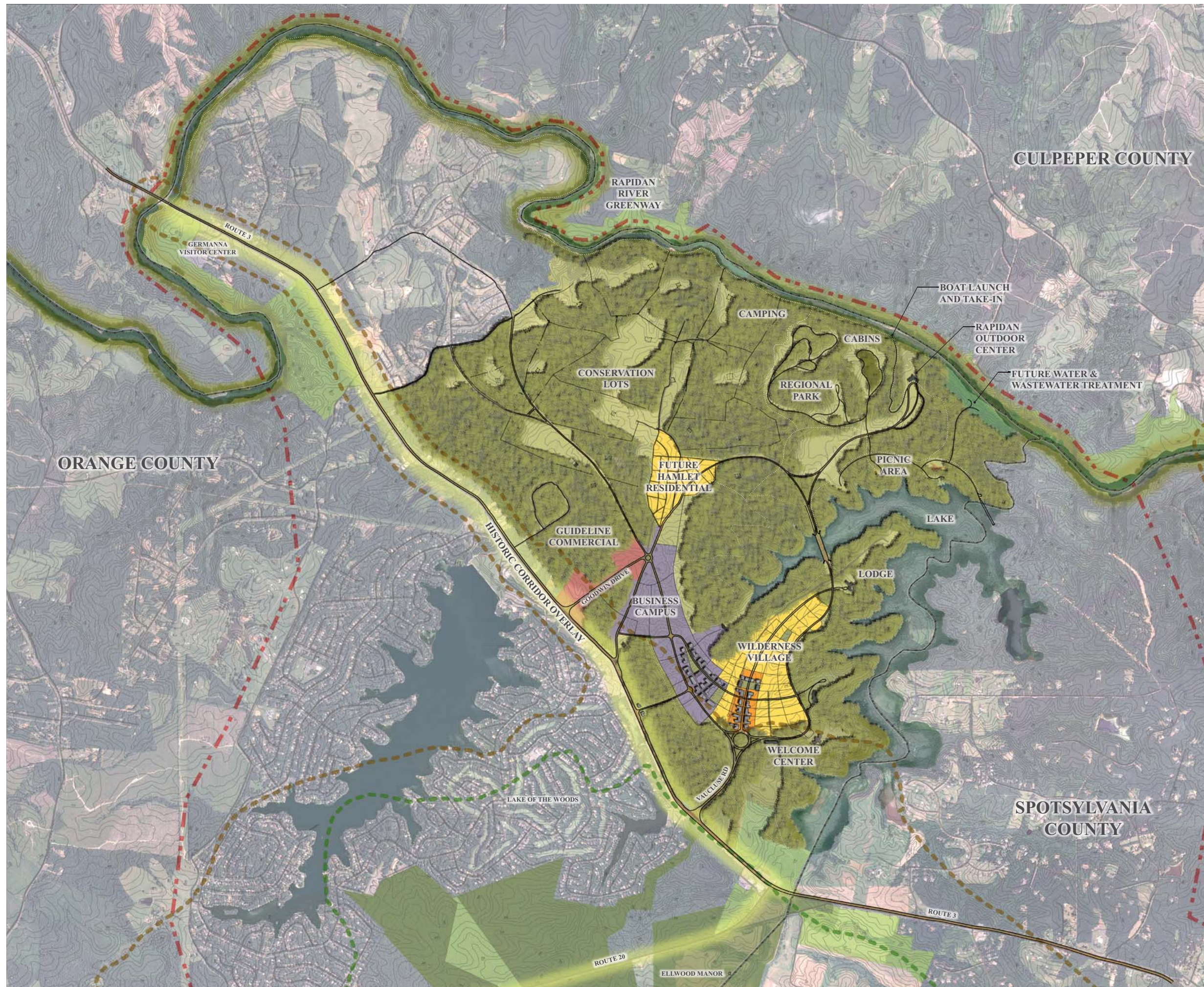
- a. Heritage Tourism efforts encouraged in Chapter III should continue in support of the final preferred plan.
- b. The recommended transportation improvements to the existing routes 3 and 20 intersection (add dual turn lanes from Route 3 and Route 20) remain the consultant team's recommended solution based on immediate impact, cost, and disturbance level, as referenced in Chapter IV. A realignment of Route 20 was not identified as a point of consensus based on the \$10 to \$15 million cost, and objections by the National Park Service; the findings of Phase I remain the preferred course of action for this study. (It was noted that there is a desire for continued discussion and investigation of traffic patterns, balanced by the intent to limit disturbance to the scenic and cultural resources of Wilderness Battlefield).
- c. The "next steps" recommendations in Chapter VII should continue to be used as a decision-making tool and resource for consideration by the County and stakeholder group.

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WILDERNESS BATTLEFIELD GATEWAY STUDY

PREFERRED PLAN - LONG RANGE

NOVEMBER 2012



Legend

- NPS Property
- Other Protected Properties
- Mixed Use Village
- Business Campus
- Guideline Commercial
- Hamlet (Future Residential)
- Open Space
- Project Area Boundary
- NR District Boundary
- ABPP Study Area Boundary



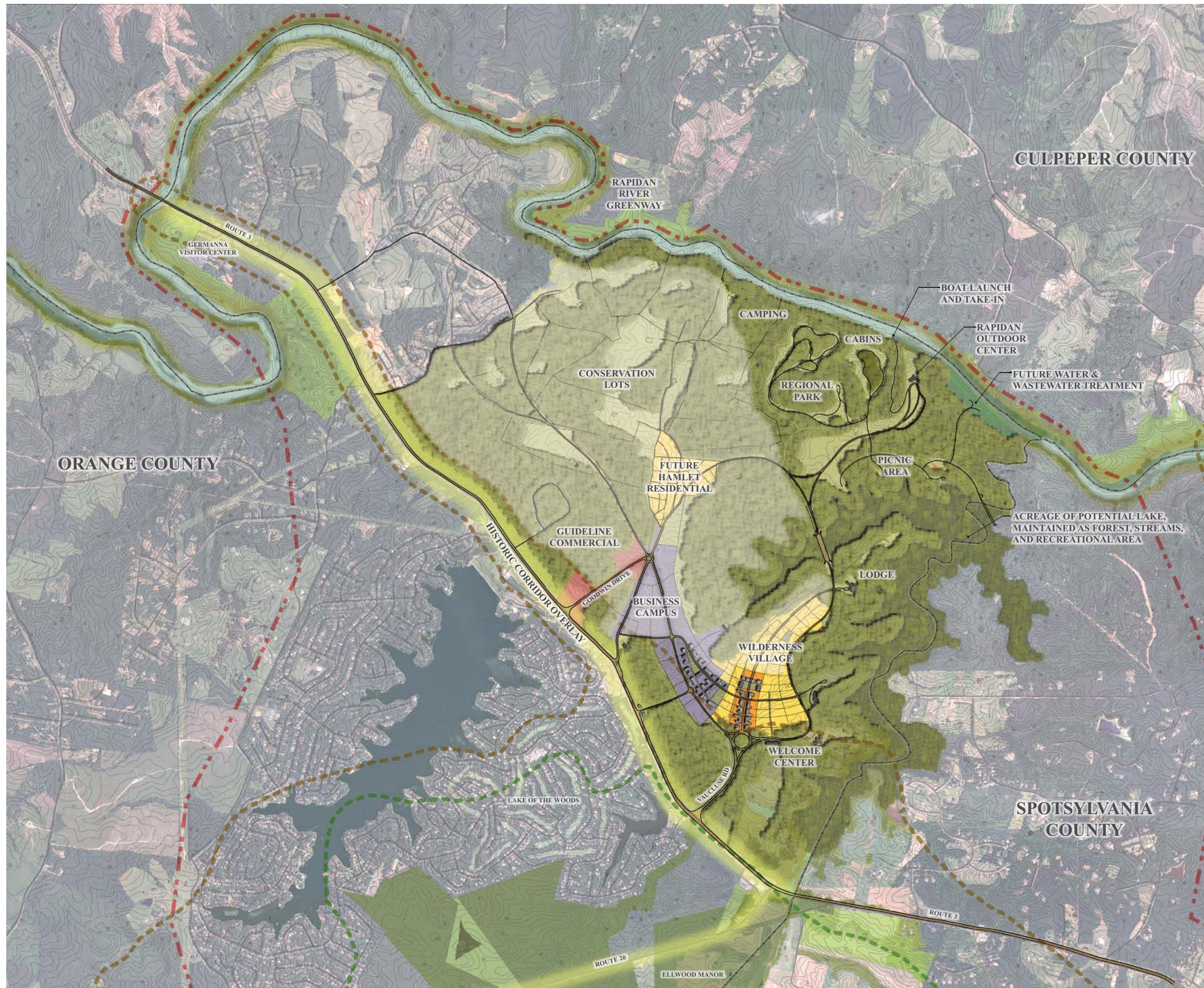
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WILDERNESS BATTLEFIELD GATEWAY STUDY

PREFERRED PLAN - PHASE 1

NOVEMBER 2012



Legend

- NPS Property
- Other Protected Properties
- Mixed Use Village
- Business Campus
- Guideline Commercial
- Hamlet (Future Residential)
- Open Space
- Project Area Boundary
- NR District Boundary
- ABPP Study Area Boundary



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