Stafford County, Virginia
Real Estate Development Advisory Services

Board Workshop

14 August 2018

Stantec

GREYSTONE

Agenda – PART ONE (approx. 1hr 15min)

1. Introduction and Regional Context

2. Purpose and Goals

3. Trends and Demographics

DISCUSSION

4. Design Principles and Tour Recap

BREAK

Interactive Component

Agenda – PART TWO (approx. 1hr 30min)

1. Vision, Strategies, and Conceptual Framework

2. Key Elements w/ Precedent Photos

3. Design Concept

4. Preliminary Feasibility

DISCUSSION

5. Next Steps

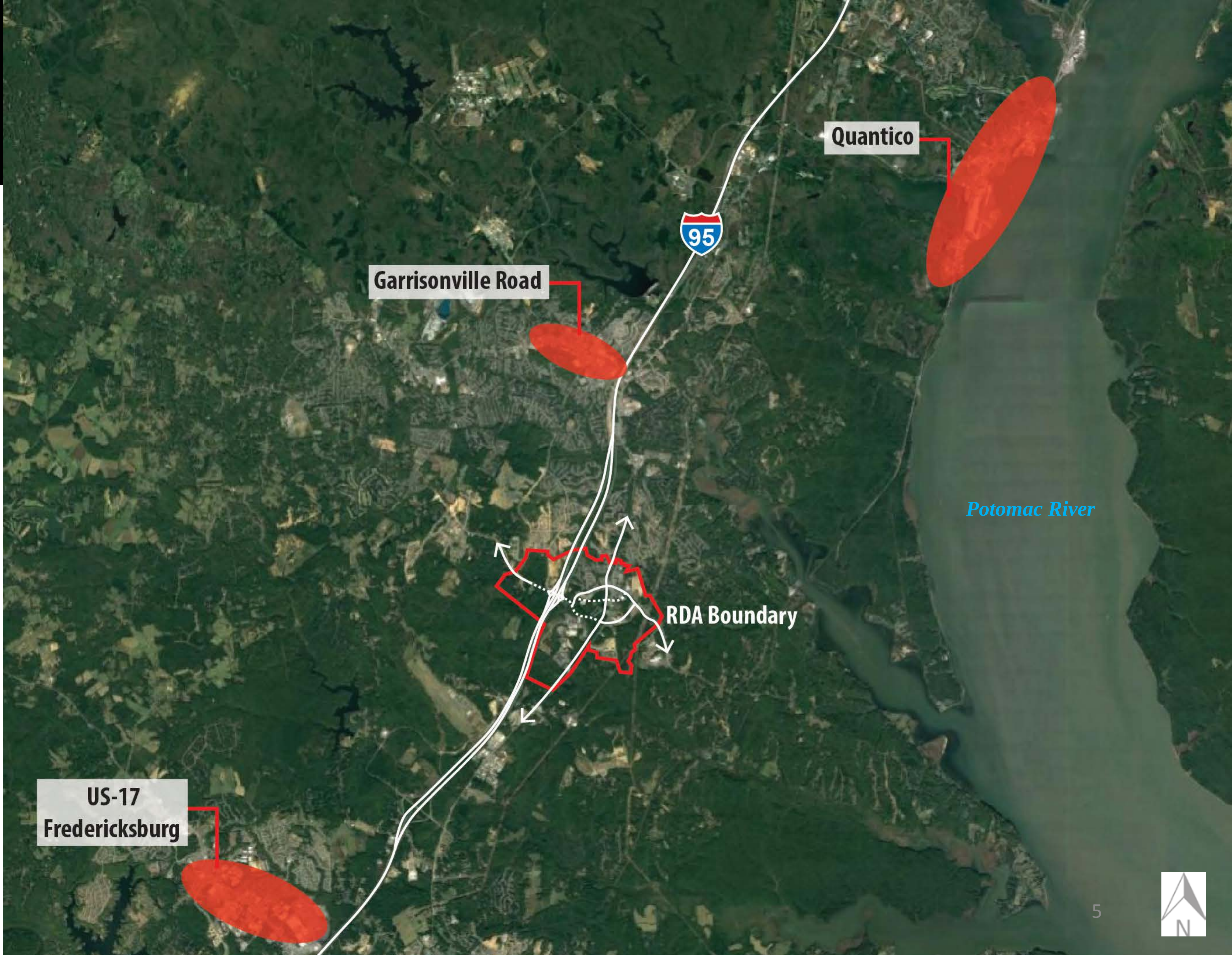
DISCUSSION

Interactive Component

Overview and Progress Update

Regional Context

- 45 miles to D.C.
- 14 miles to Quantico
- 12 miles to Fredericksburg
- 5 miles to Garrisonville Road



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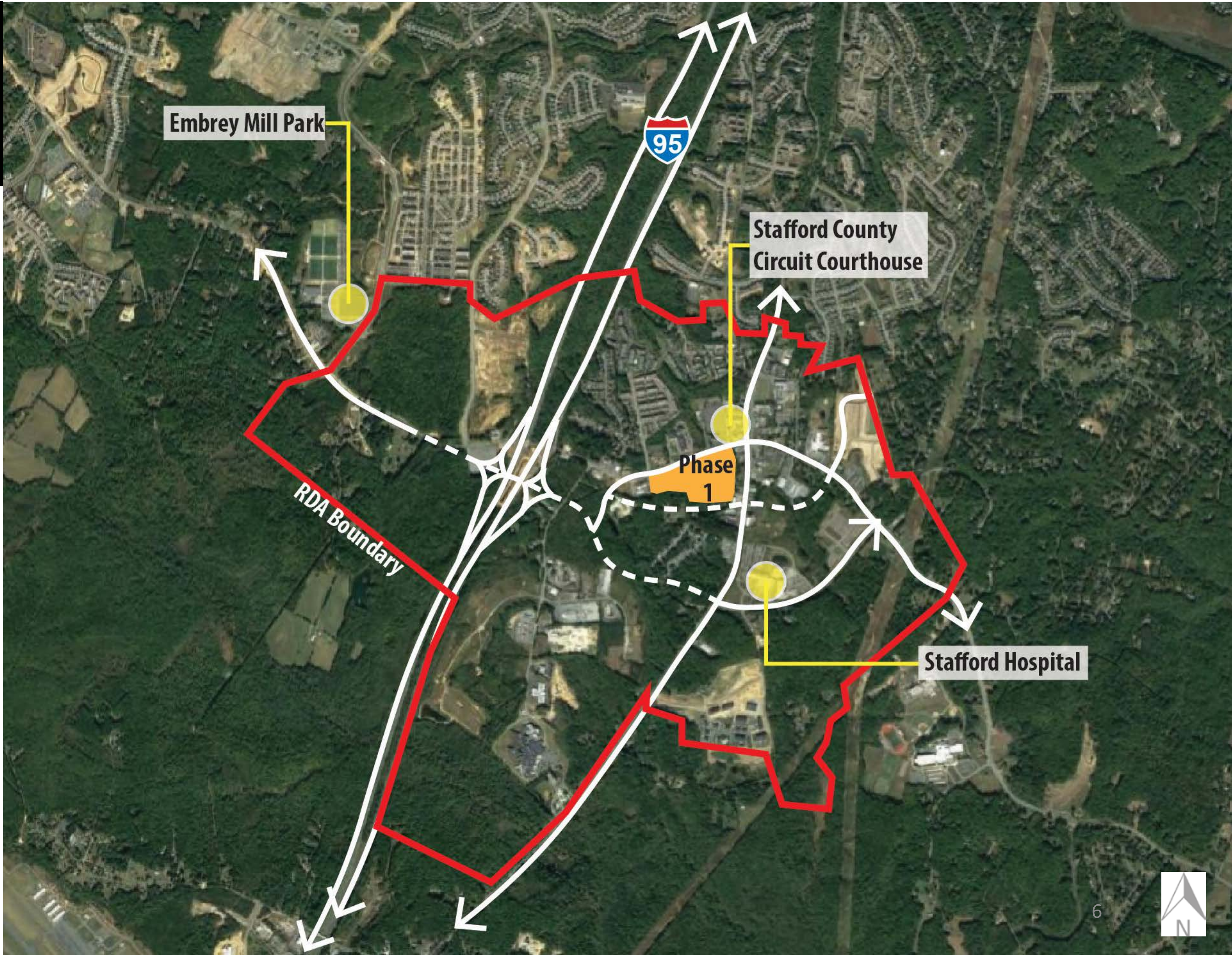
RDA Context

- Regional access via I-95
- Jobs: Government Center complex and Stafford Hospital
- Recreation: Embrey Mill Park and Rouse Center
- Education: Several schools within 3 miles
- Other investment in RDA



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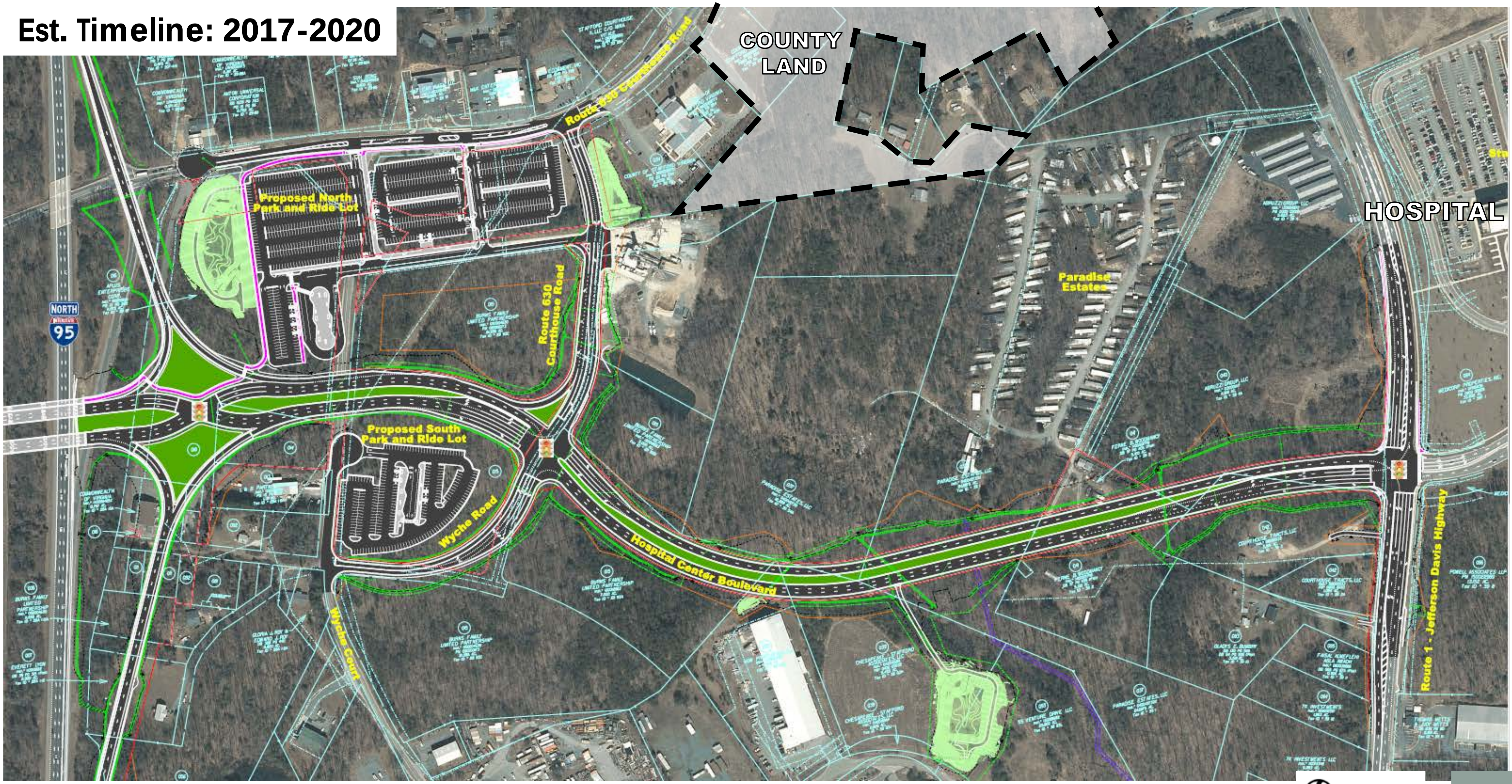
Planned Improvements – I-95/Rt 630 Interchange



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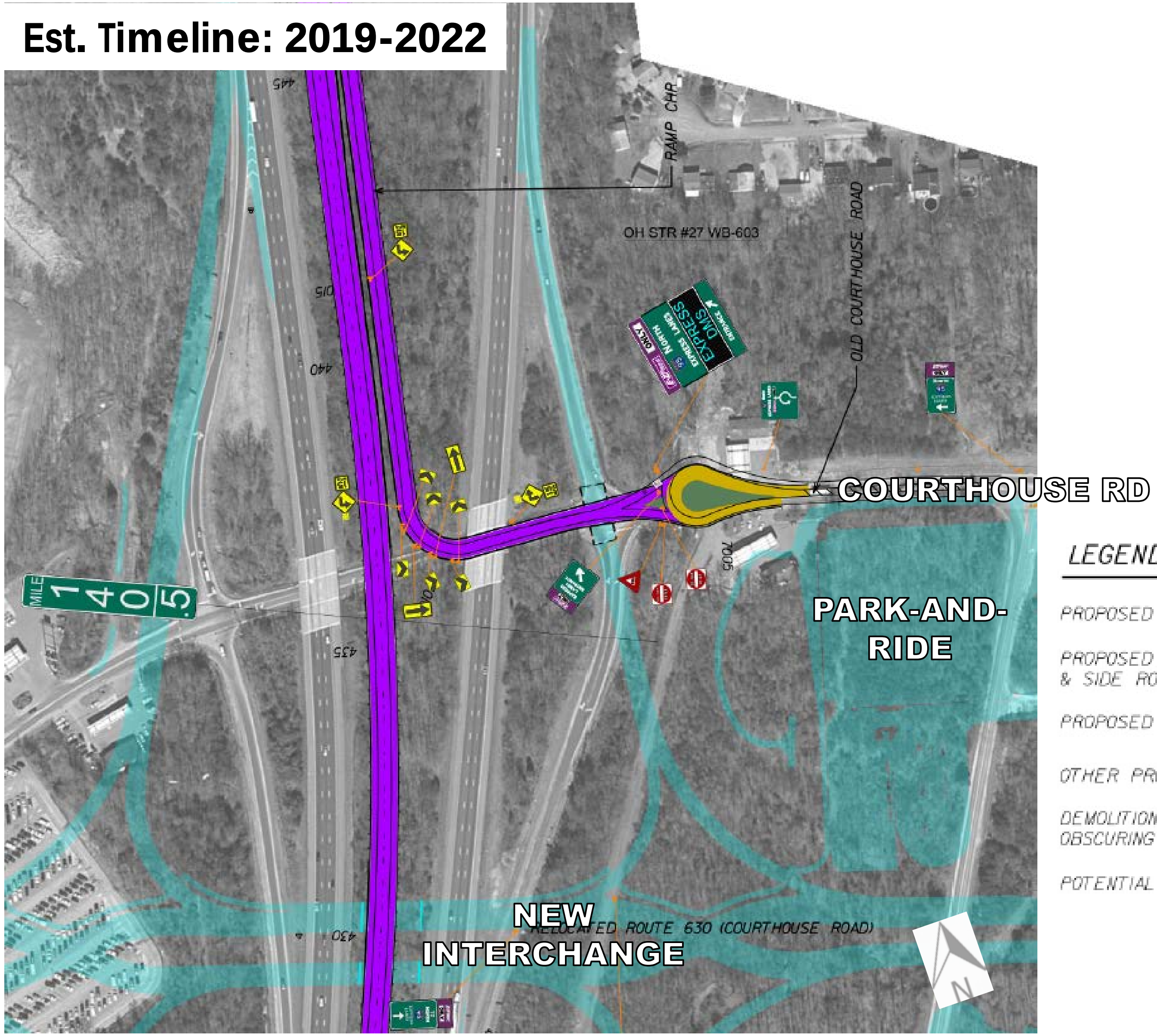
Planned Improvements – Express Lanes

Est. Timeline: 2019-2022

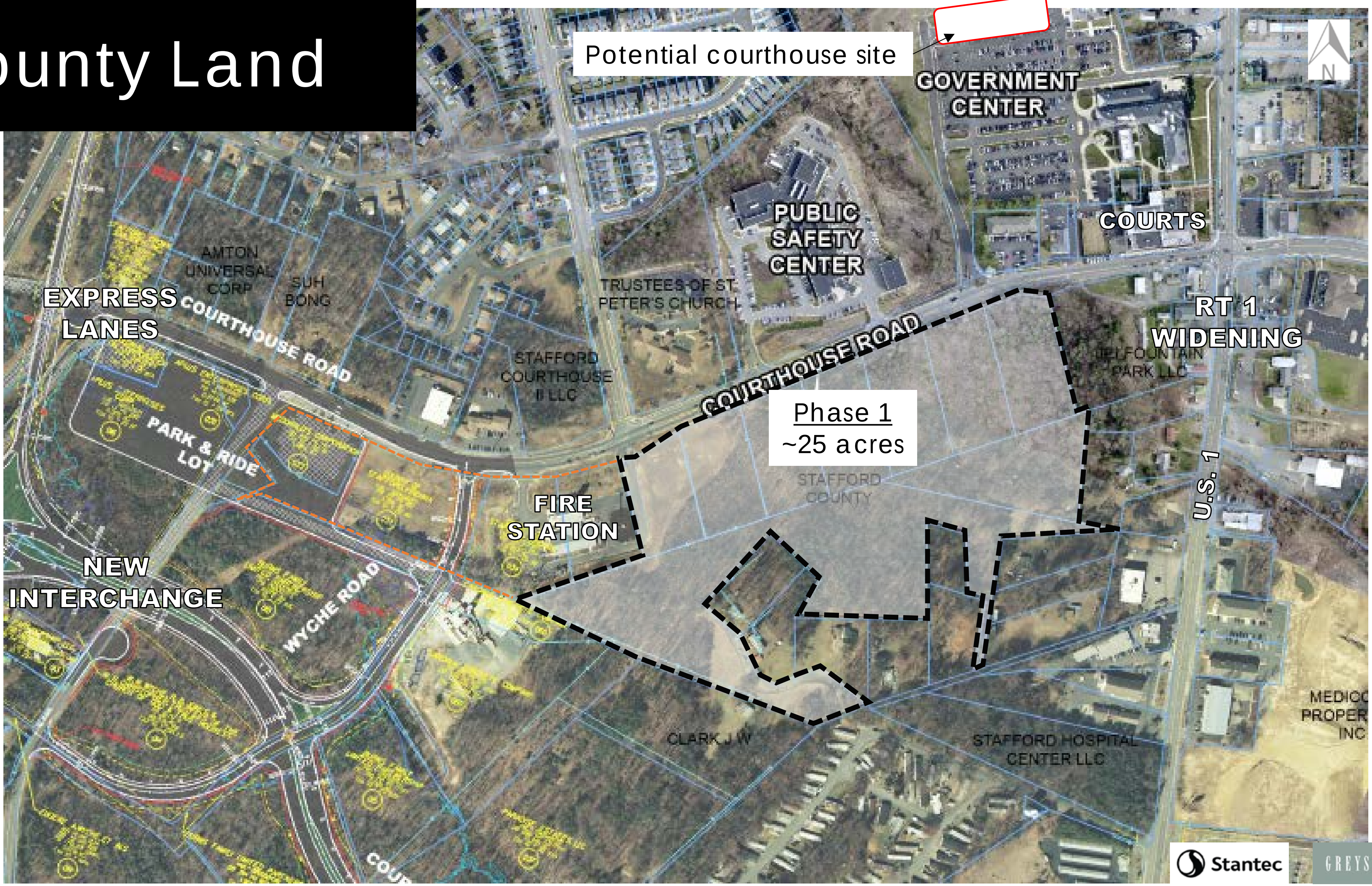


LEGEND

- PROPOSED EXPRESS LANES & RAMPS
- PROPOSED GENERAL PURPOSE LANES & SIDE ROAD IMPROVEMENTS
- PROPOSED STRUCTURES
- OTHER PROJECTS ALONG CORRIDOR
- DEMOLITION OF PAVEMENT AND OBSCURING OF ROADWAY
- POTENTIAL RIGHT OF WAY ACQUISITION
- EXISTING SIGN / STRUCTURE
- PROPOSED SIGN / STRUCTURE
- PROPOSED EXPRESS LANES DMS
- EXISTING DMS
- PROPOSED SIGN PANEL
- EXISTING PAVEMENT MARKING
- PROPOSED PAVEMENT MARKINGS

Planned Improvements – Route 1 Widening

County Land



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Meeting Goals and Objectives

- Provide update on project status to date

- Gain buy-in and obtain input from Supervisors on Downtown vision and design principles

- Discussion of Next Steps with an eye toward implementation

Project Background

Stantec was engaged to study the possibility of creating a Downtown Stafford.

Stafford County has:

- Limited locations to gather, recreate, shop, dine, etc.
- Few mixed-use and walkable developments
- Land ownership in key location near highway interchange including existing government office and court complex
- Buying power
- Great potential to create a vibrant downtown development

Project Timeline

Onboarding of Team

Background info gathering and analysis

Tour of mixed-use developments in the region

Development of Design Principles, Framework, and Conceptual Site Plans

Financial Analysis of Conceptual Program

Present Findings

Direction to Implement

Regulatory modifications and Developer Solicitation

Current Progress Point

Stantec GREYSTONE

National Trends Influencing Stafford

SUBURBAN REMIX

CREATING THE NEXT GENERATION OF URBAN PLACES

STAFFORD, VA . David Dixon FAIA . August 14, 2018

"North America is a ***suburban continent*** with an ***urban population***"

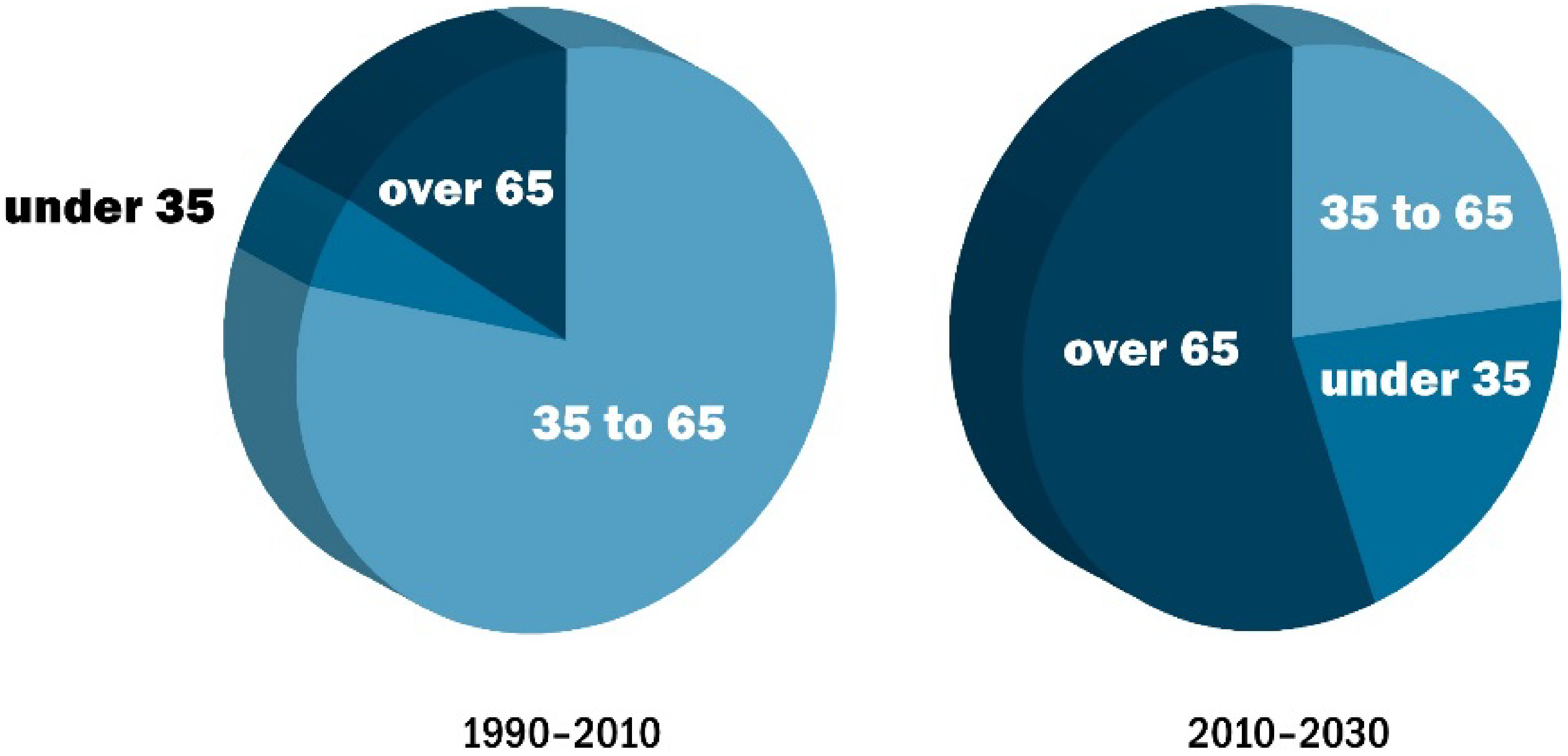
The **great reset**:

a perfect storm of demographic, values, and economic change

A BRIEF PROLOGUE-from the Civil War to the Great Reset

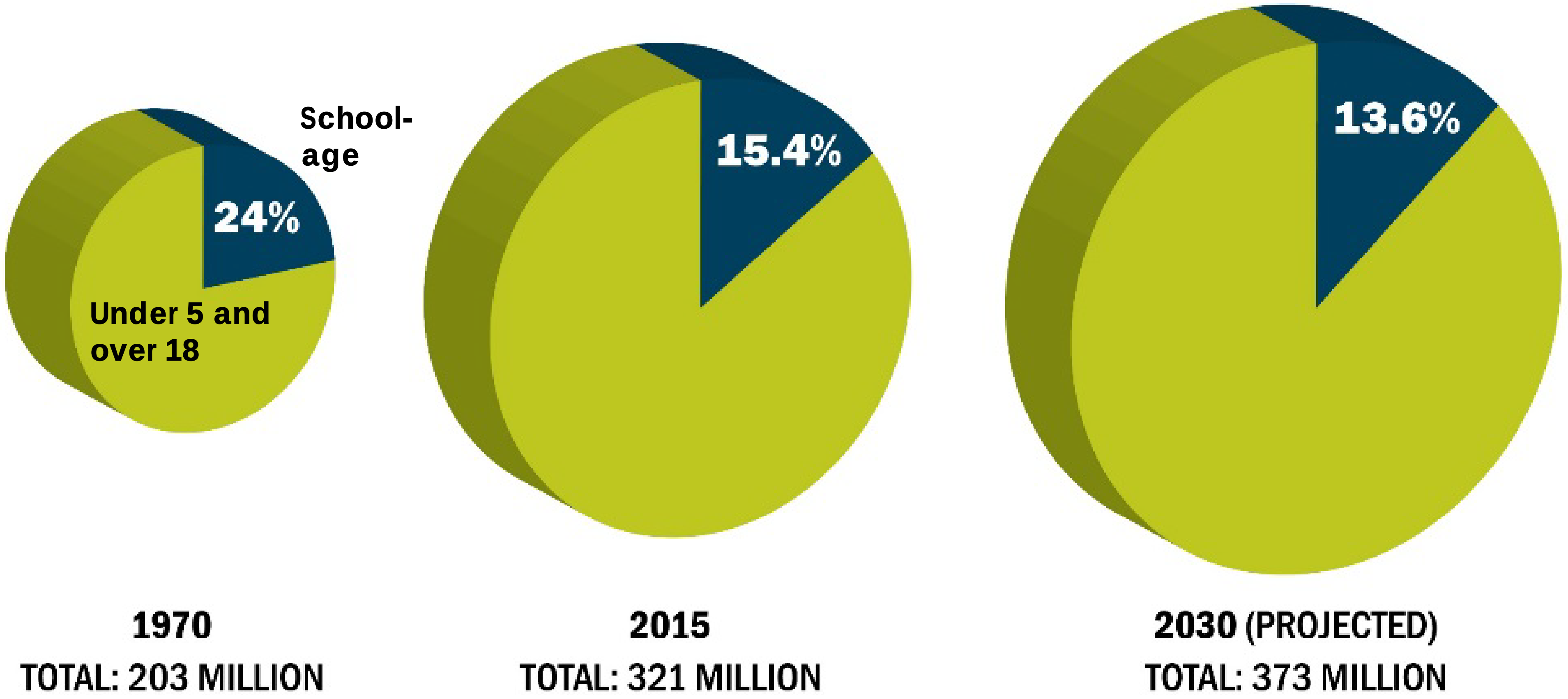
The Villages, FL

DEMOGRAPHICS ARE DESTINY: the present future
The Great Reset to the mid-2030s (and later...)



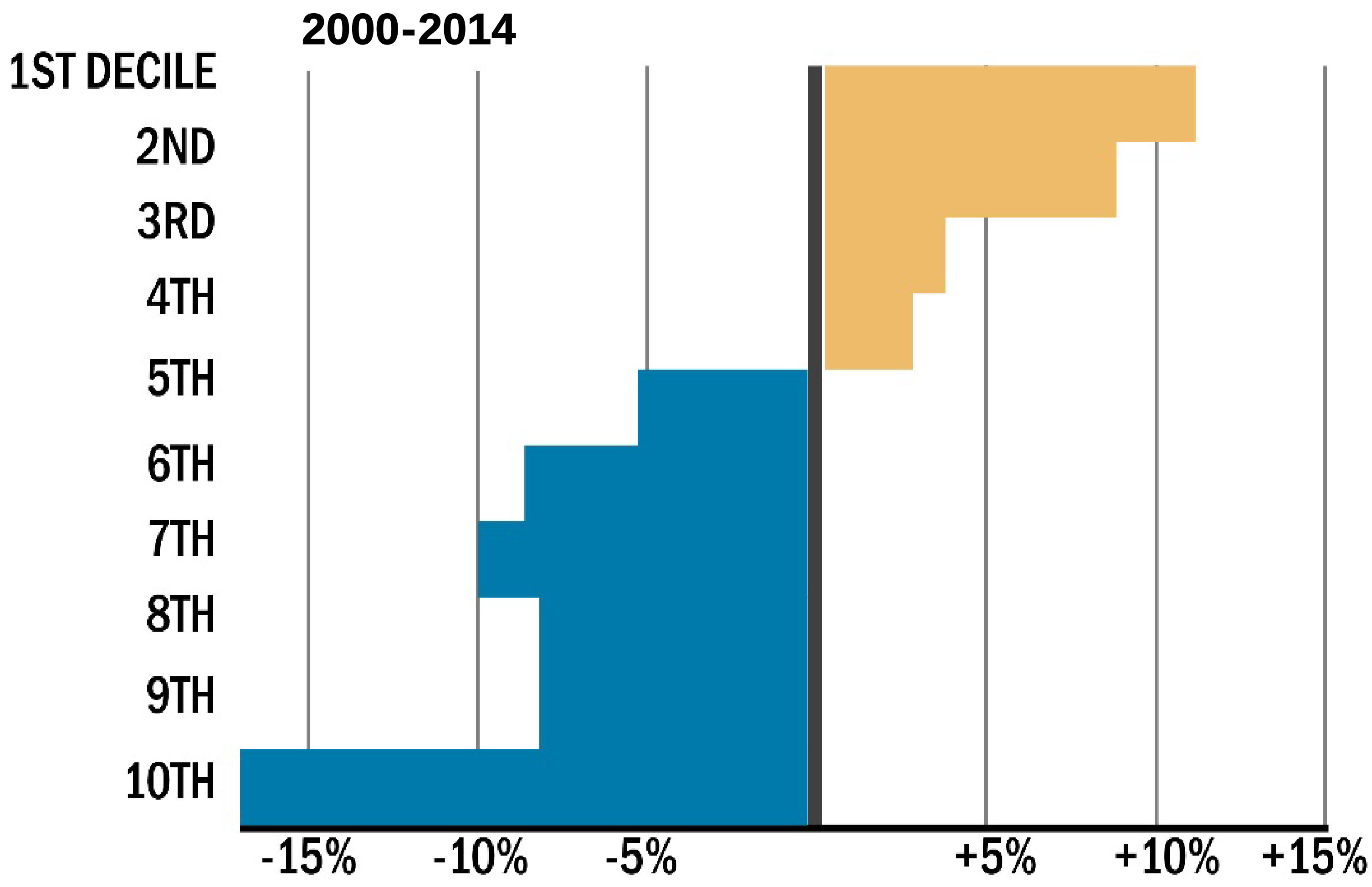
Population growth by age group: US population is growing older and younger

Between 1970 and 2030 the US will add 170 million people… including 2 million school-age kids

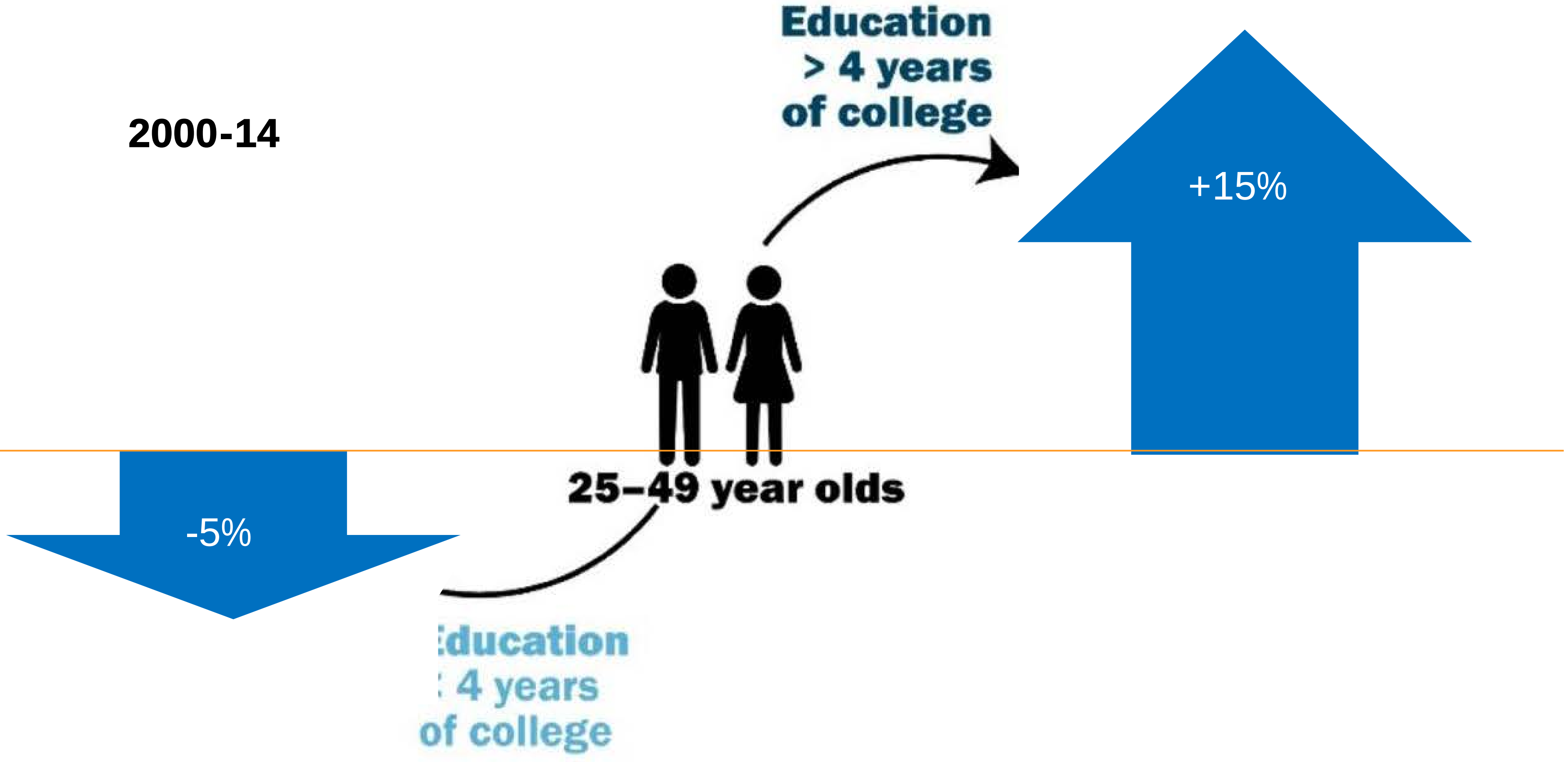


SOURCE : U.S. CENSUS BUREAU
HTTPS://WWW.CHILDSTATS.GOV/AMERICASCHILDREN/TABLES/POP1.ASP

Higher income households are moving into urban centers

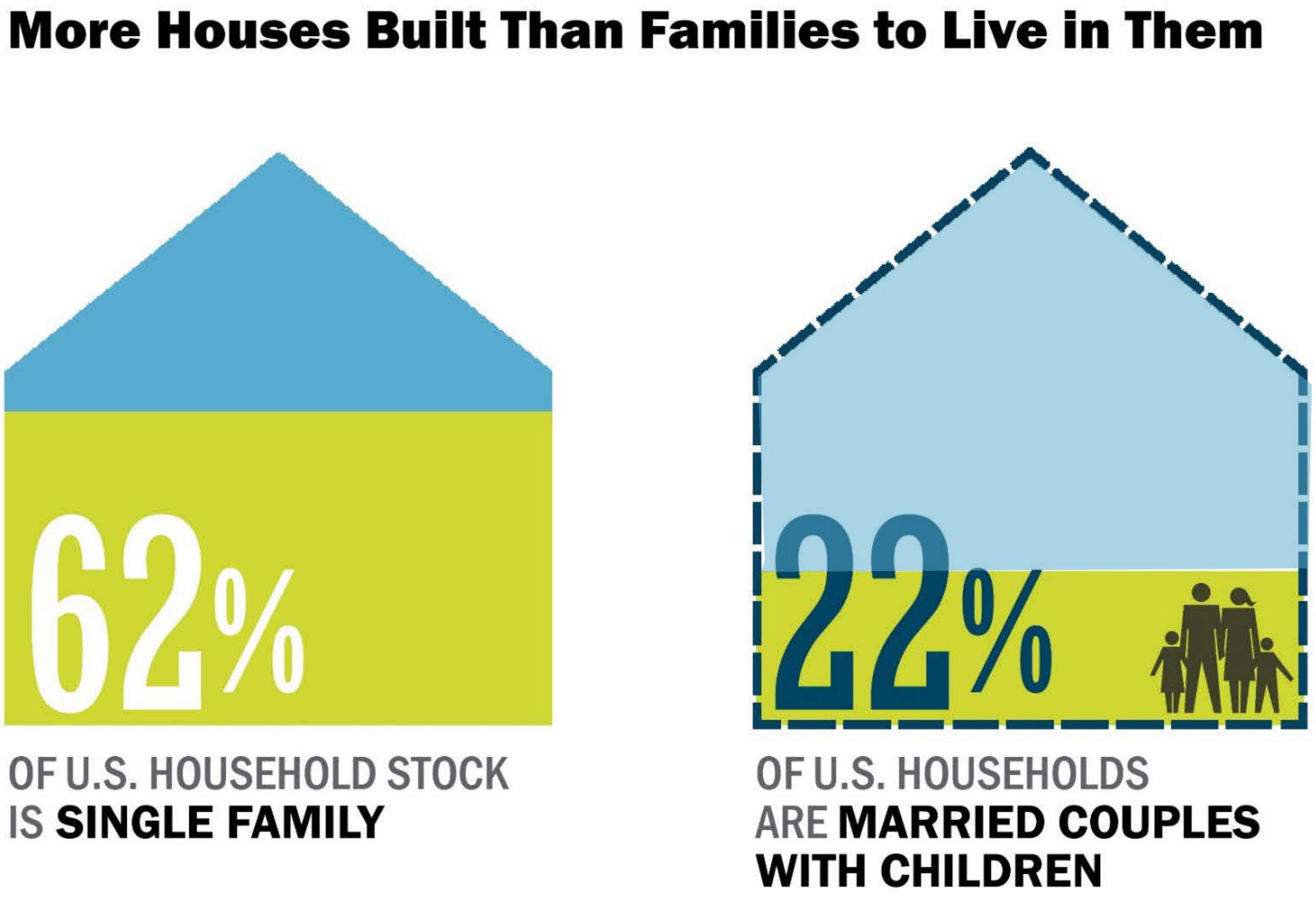


Educated millennials (and gen-Xrs...) are moving into urban centers



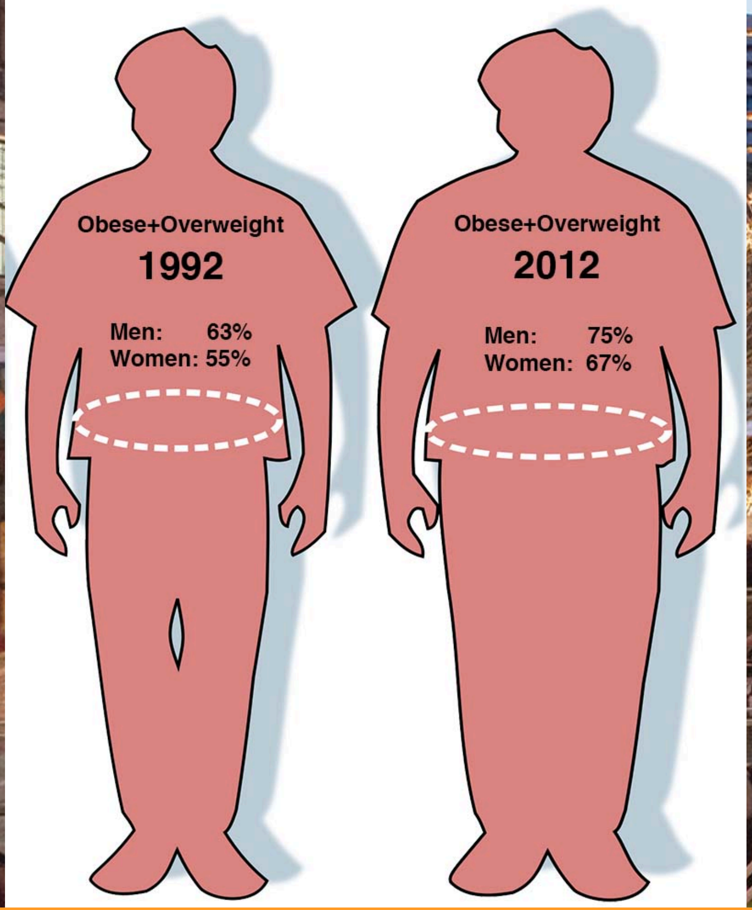
SOURCE: JED KOLKO, CHIEF ECONOMIST, TRULIA.COM

There is a dramatic mismatch between the US housing stock and the US population



2011-2030 demand for roughly 50-55M "urban" housing units

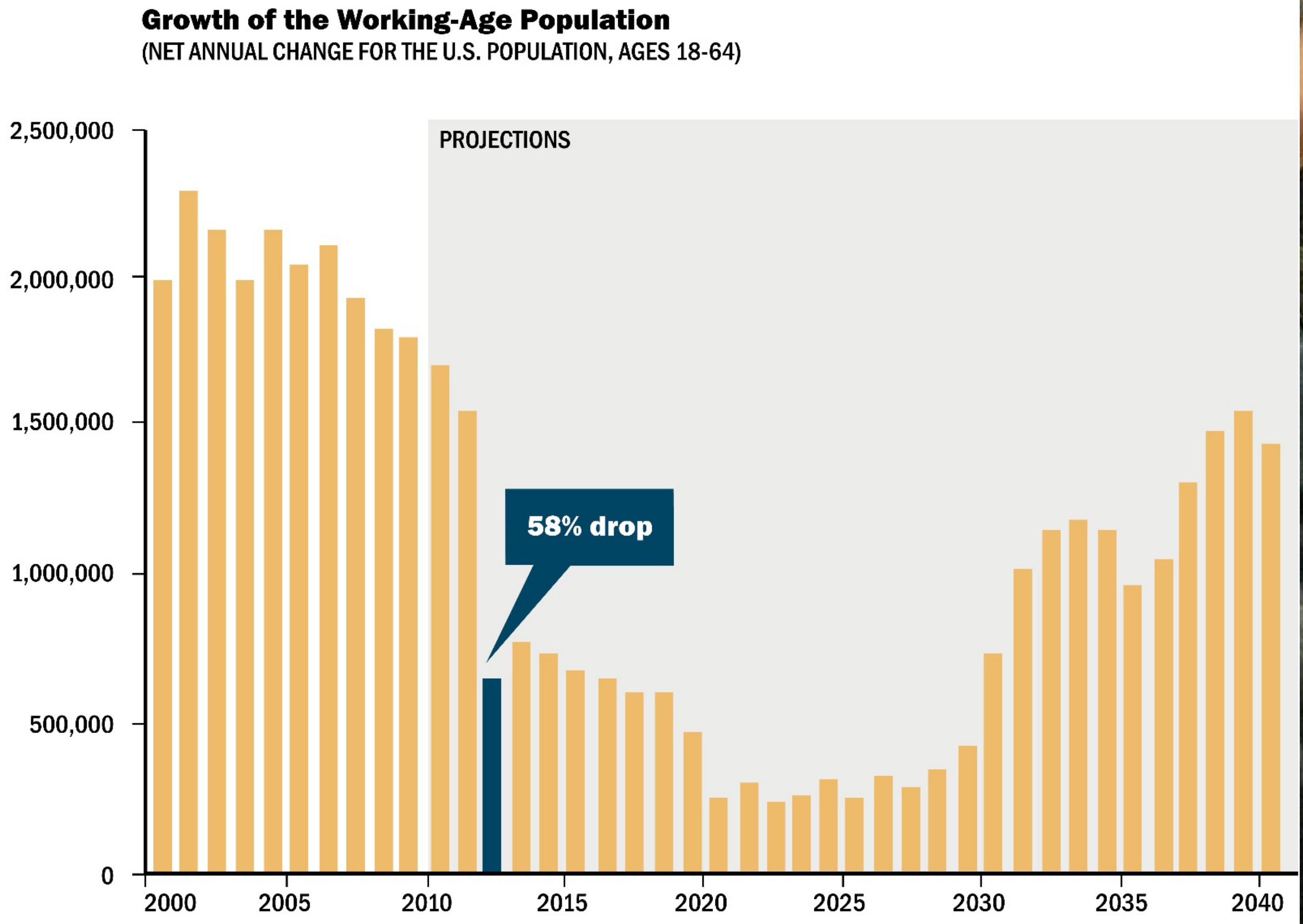
Wellness matters more today and walkable, urban environments are viewed healthier



Per cent of Americans who are overweight

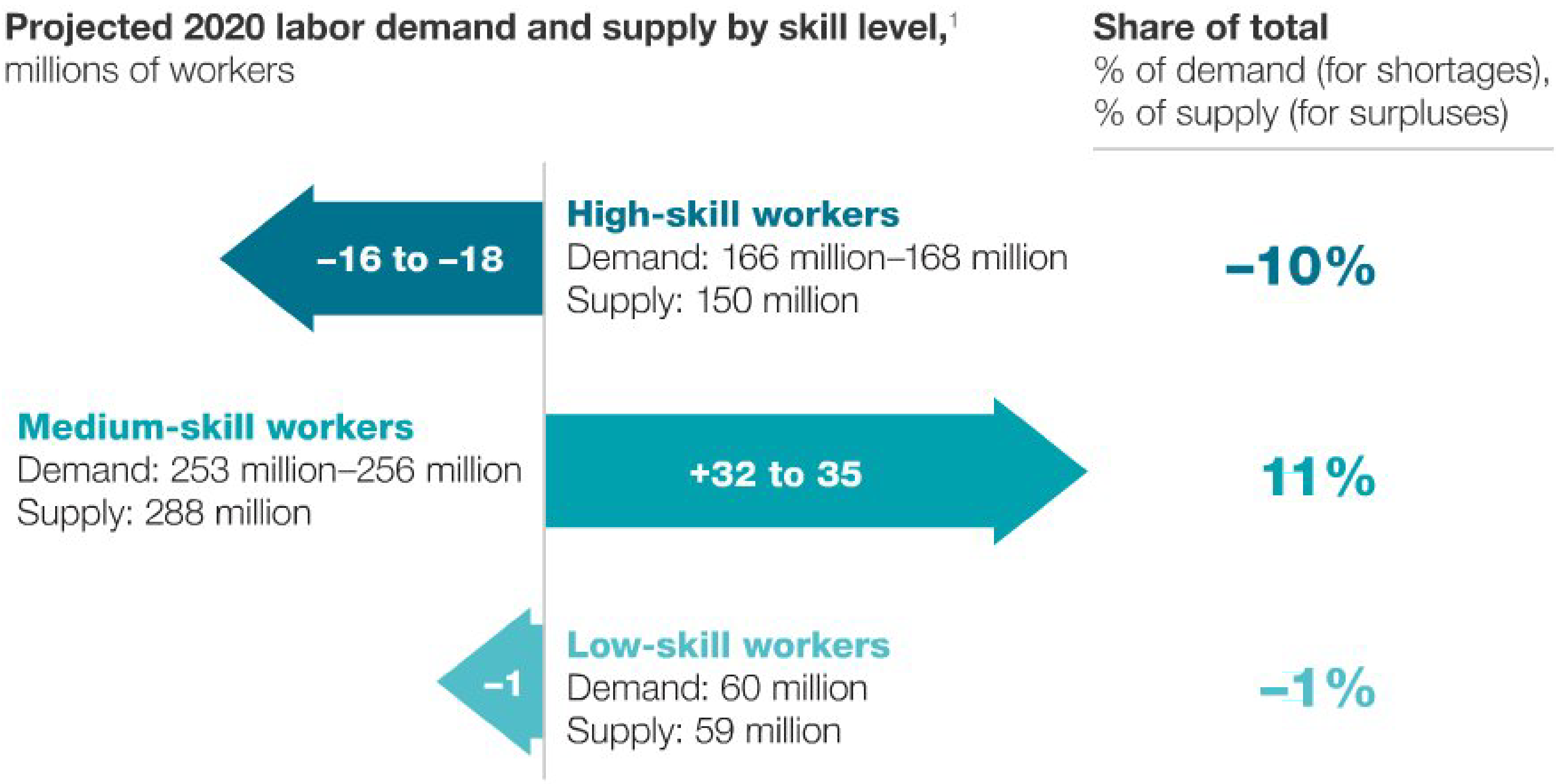
ECONOMIC IMPERATIVE
Knowledge industries are heading to urban places

Economic imperative: a dramatic slowdown in workforce growth is creating labor shortages

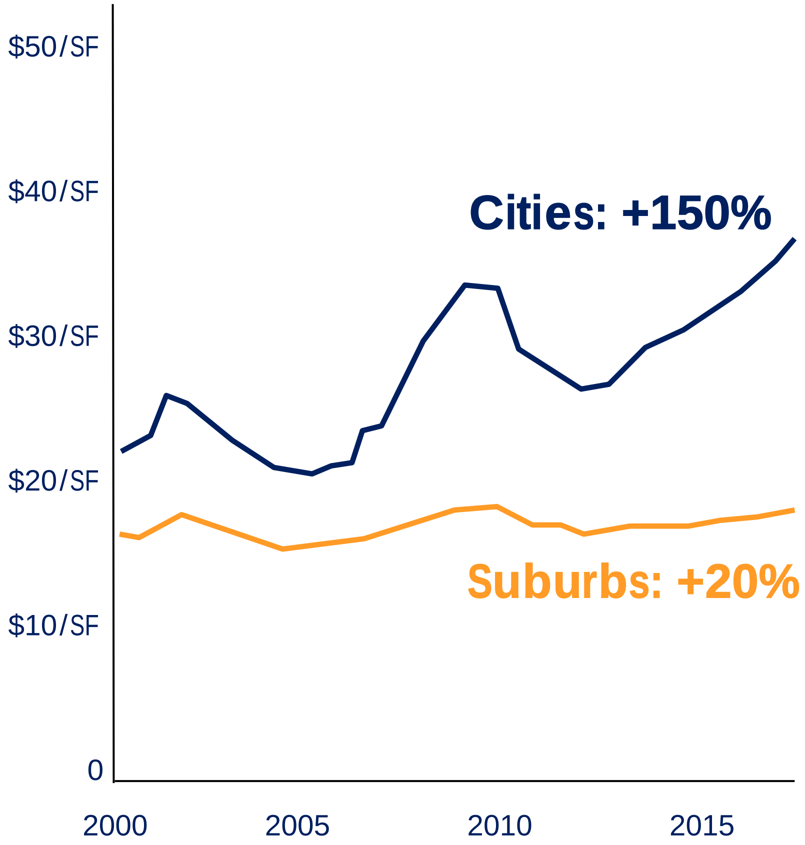


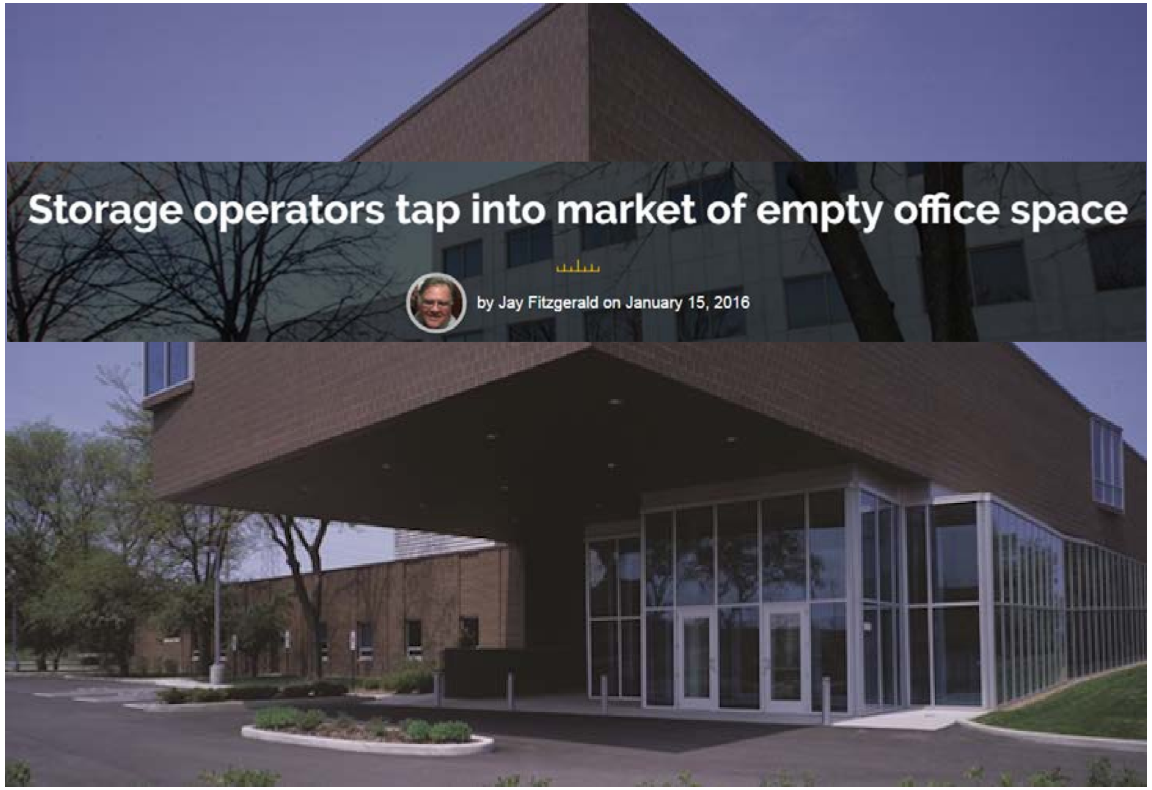
SOURCE : U.S. CENSUS BUREAU, ESTIMATED (2005-2011), PROJECTED (2012-2040); CUSHMAN & WAKEFIELD RESEARCH SERVICES

A growing shortage of knowledge workers means jobs and investment follow these workers



Since 2000 office rents in downtowns have risen more than seven times as fast as in the suburbs



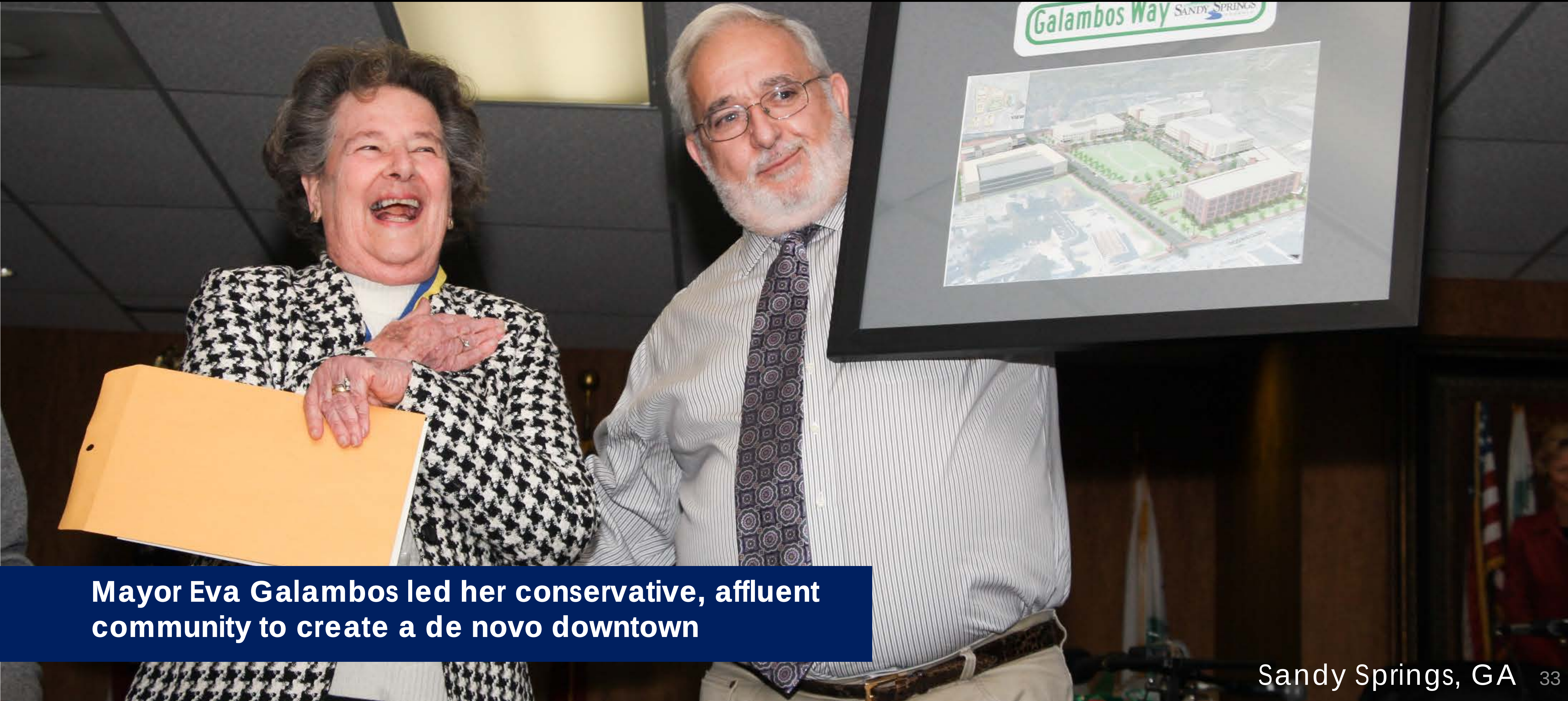


The **opportunity**:

the next generation of urban places

thresholds for success: leadership, engagement, partnership, *transformative* planning

LEADERSHIP



Mayor Eva Galambos led her conservative, affluent community to create a de novo downtown

Sandy Springs, GA

The New York Times

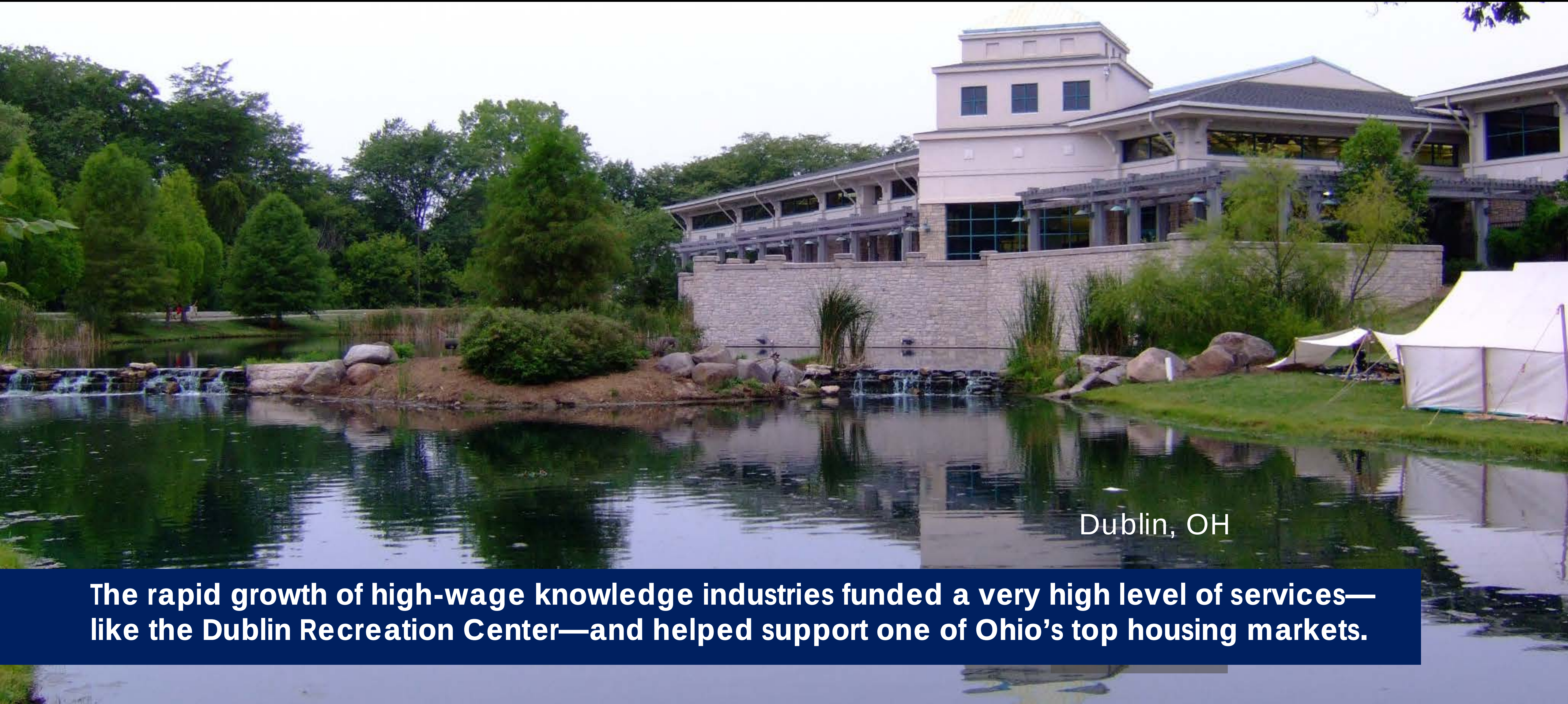
A Georgia Town Takes the People's Business Private

Sandy Springs, GA

SANDY SPRINGS CITY CENTER

ENGAGEMENT

Dublin Ohio’s City Manager and Council launched a year-long community-based visioning process centered around an intensive series of workshops, lectures, and charrettes



The rapid growth of high-wage knowledge industries funded a very high level of services—like the Dublin Recreation Center—and helped support one of Ohio's top housing markets.

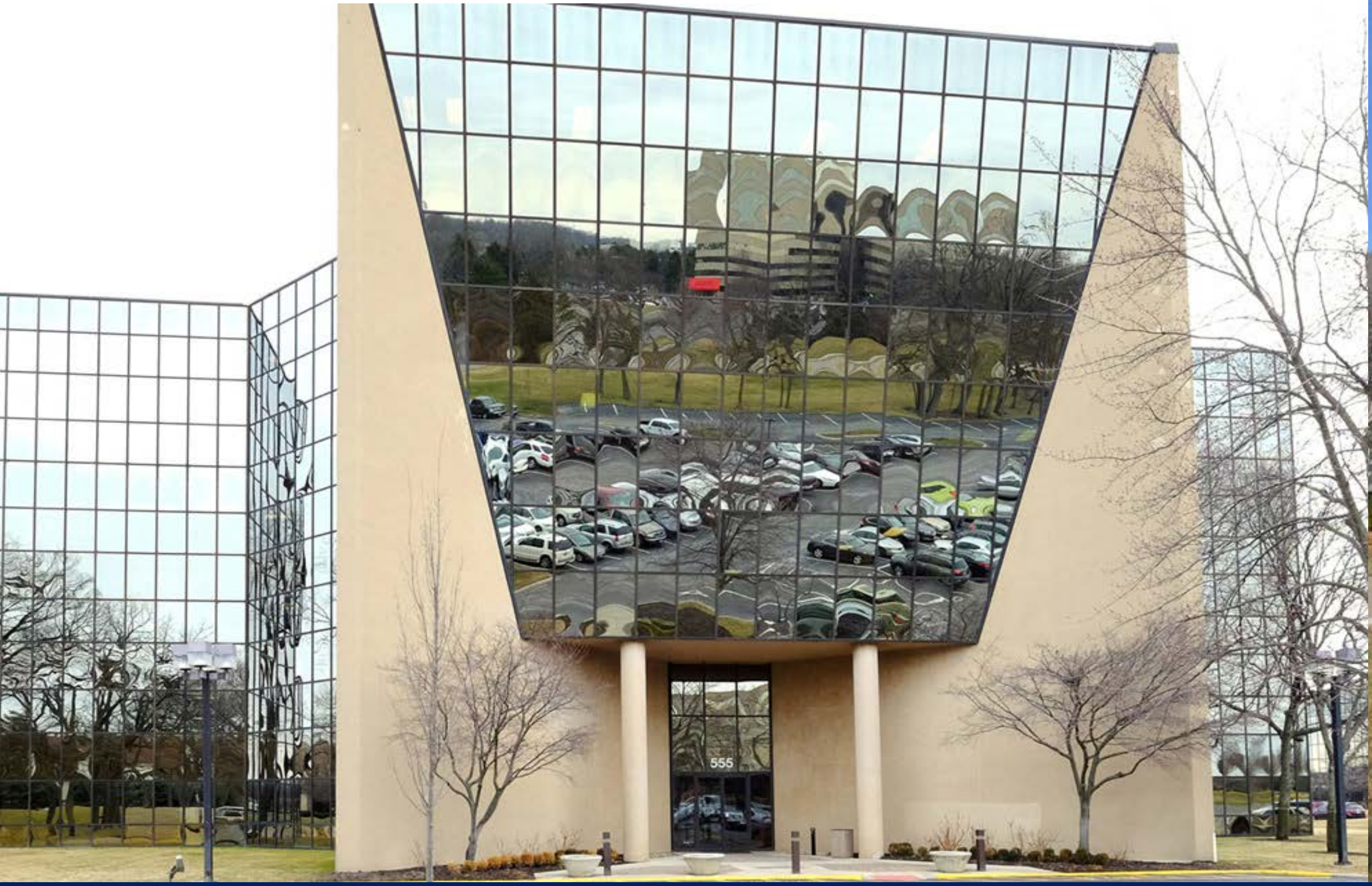
Dublin ranks among America's Top 20 Creative Class Cities

Richard Florida - International
Best-selling author, professor & urbanist

A top ranked suburb to live, work, and start a business, Dublin had long prided itself on "staying ahead of the economic development curve" and saw change coming

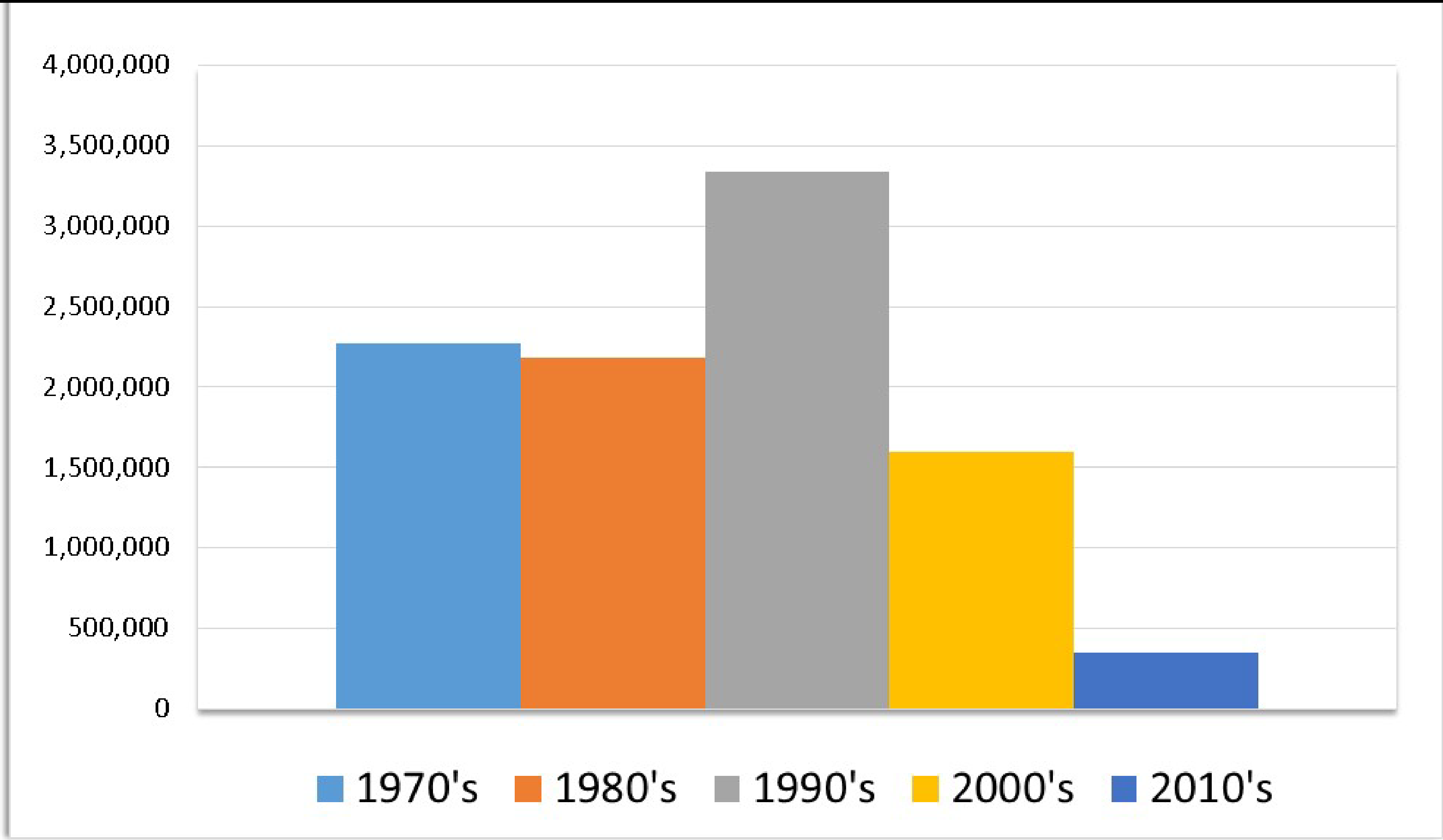
What, Me Worry?

MAD



The community came to understand that its class A office parks and high end subdivisions were losing their appeal to a changing world…and an aging Dublin

New office development by decade: total square feet



Community members drilled down into the trends that shaped the commercial office markets so important to Dublin's ability to fund a high quality of life.

A new walkable downtown would help Dublin retain and attract knowledge workers…and employers…and more important—create a new heart to the community

Dublin, OH

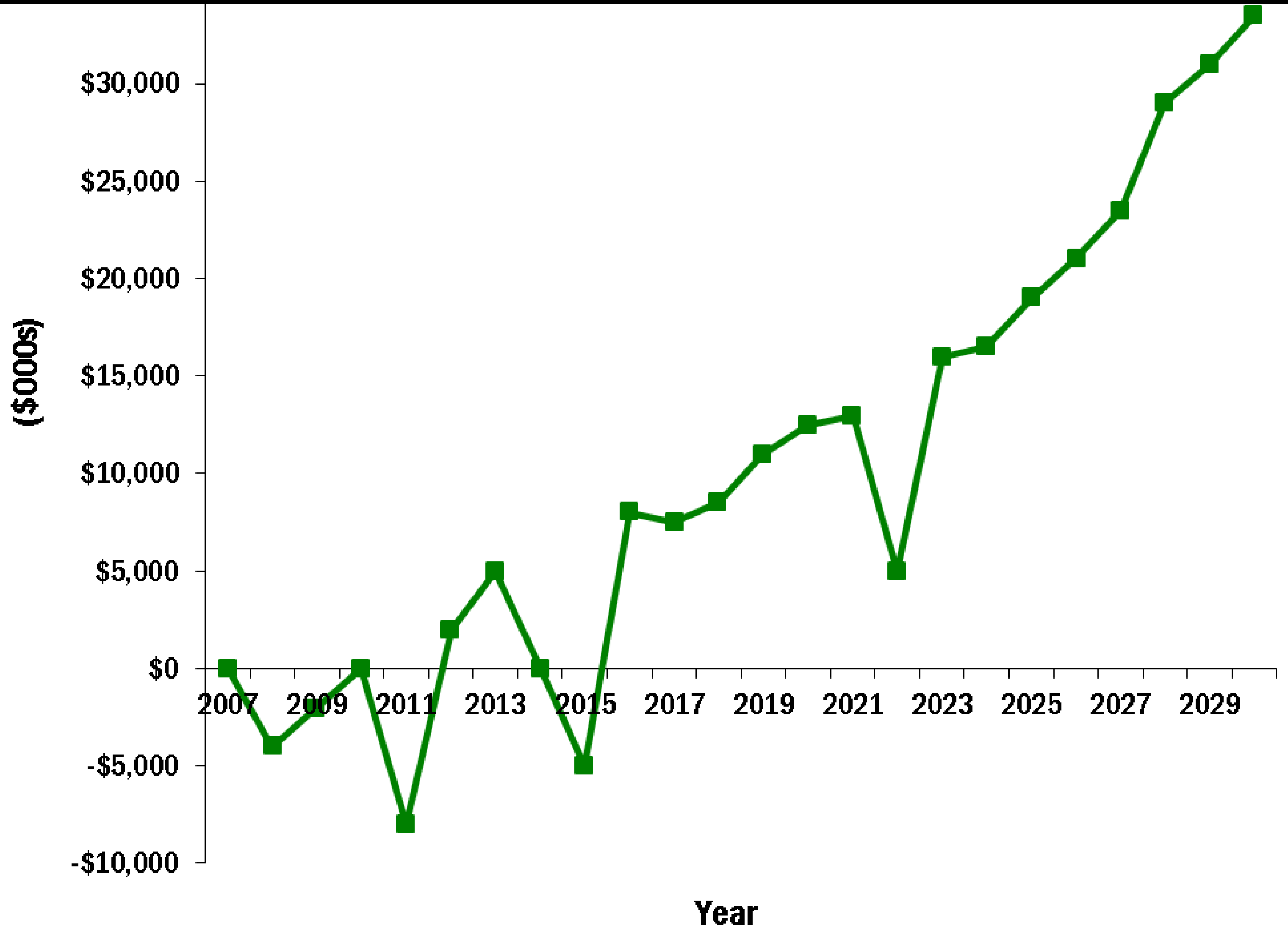
BridgePark represents the first phase, a three million SF mix of housing, office, retail, food, culture, education…and a new Scioto Riverfront “central park”.

Dublin, OH


Dublin, OH

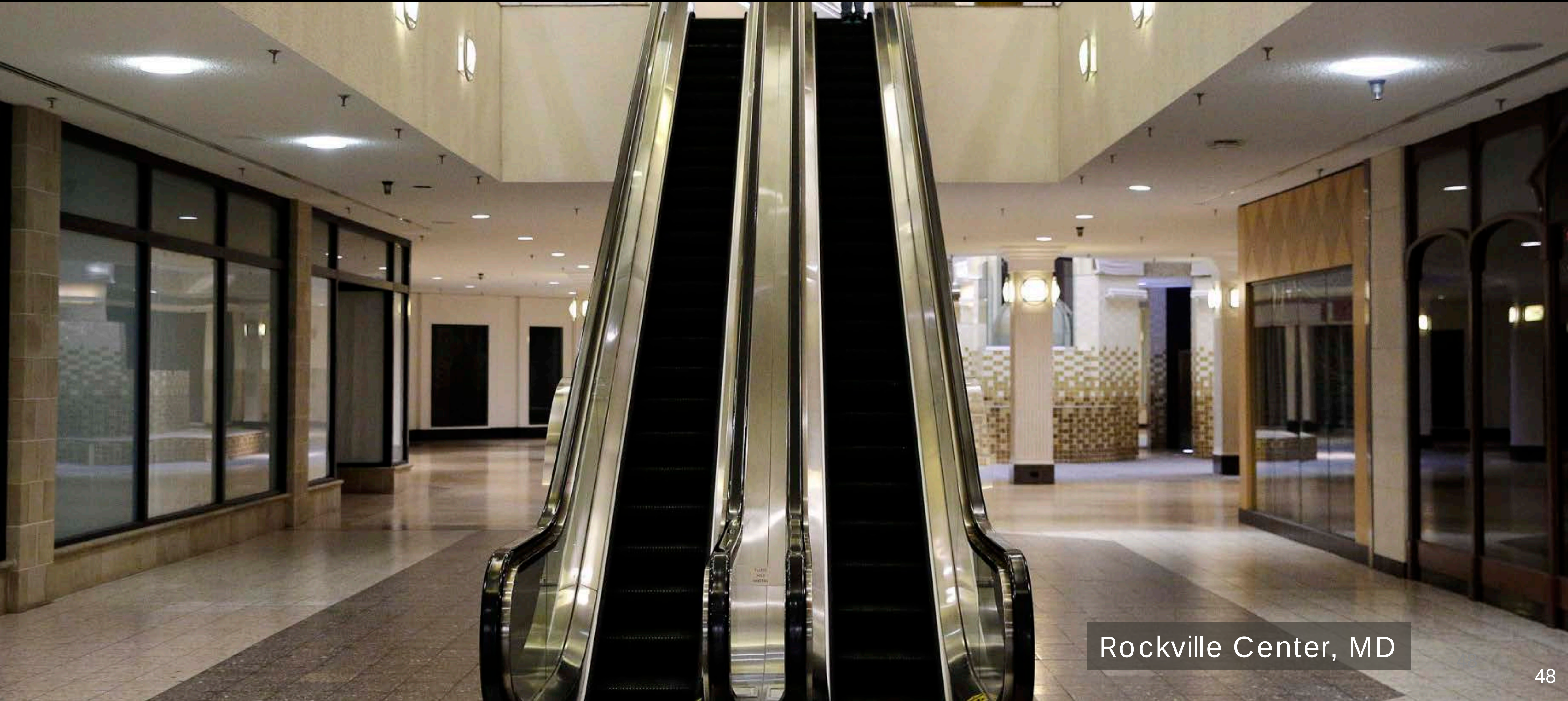

Dublin, OH
endrestudio

Net fiscal impact from new growth



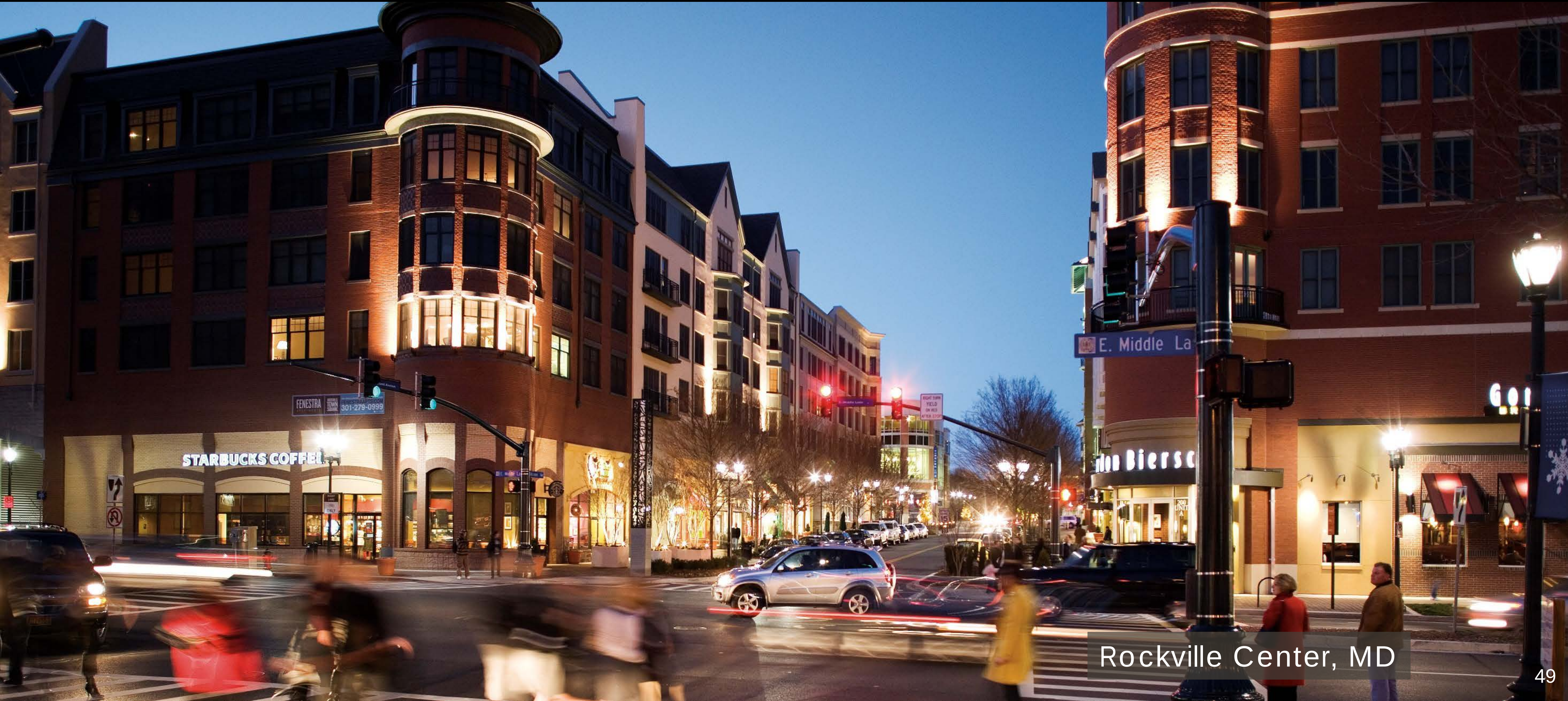
Dublin, OH

PARTNERSHIPS



Rockville Center, MD

Fiscal benefits unlock the ability to invest in “urban” infrastructure — street grid, parking, parks and squares



Rockville Center, MD

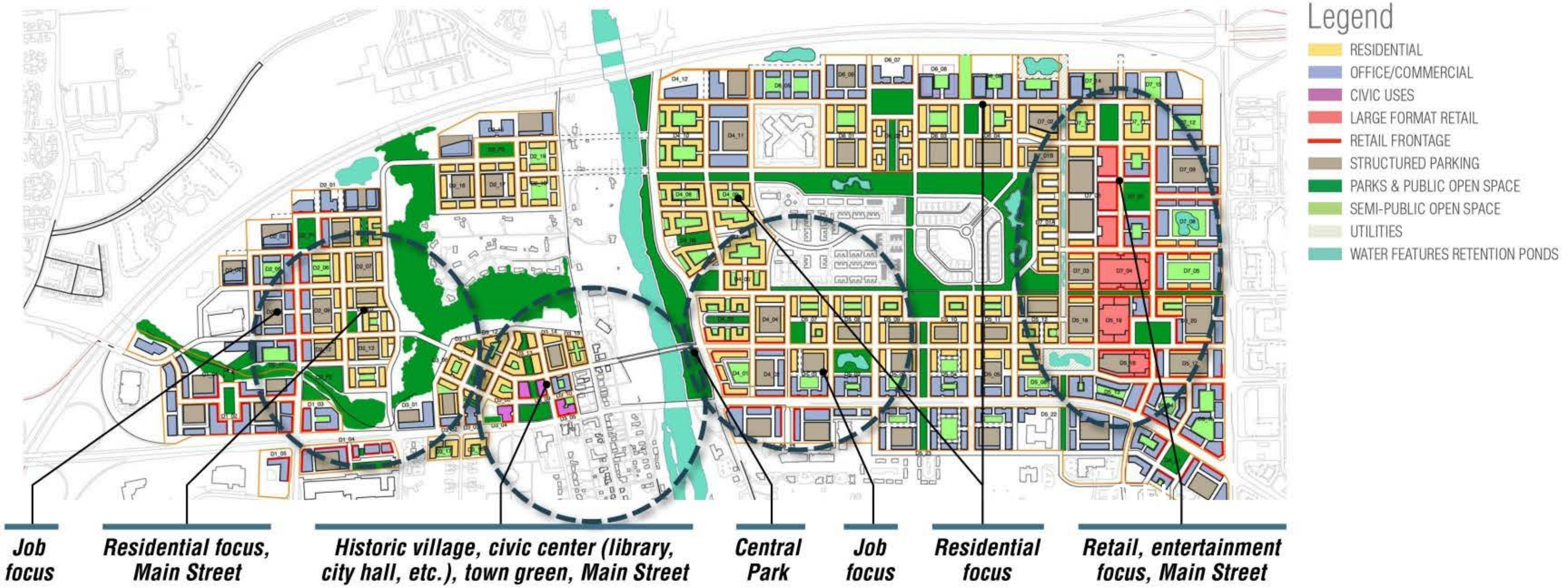
TRANSFORMATIVE PLANNING

Fourth step: Create a vision framework

Vision Principles

- Enhance economic vitality
- Integrate the new center into community life
- Embrace Dublin's natural setting and commitment to sustainability
- Expand "livability choices" for Dublin and the region
- Create places that embody Dublin's commitment to community

ILLUSTRATIVE VISION FRAMEWORK



Putting the market to work

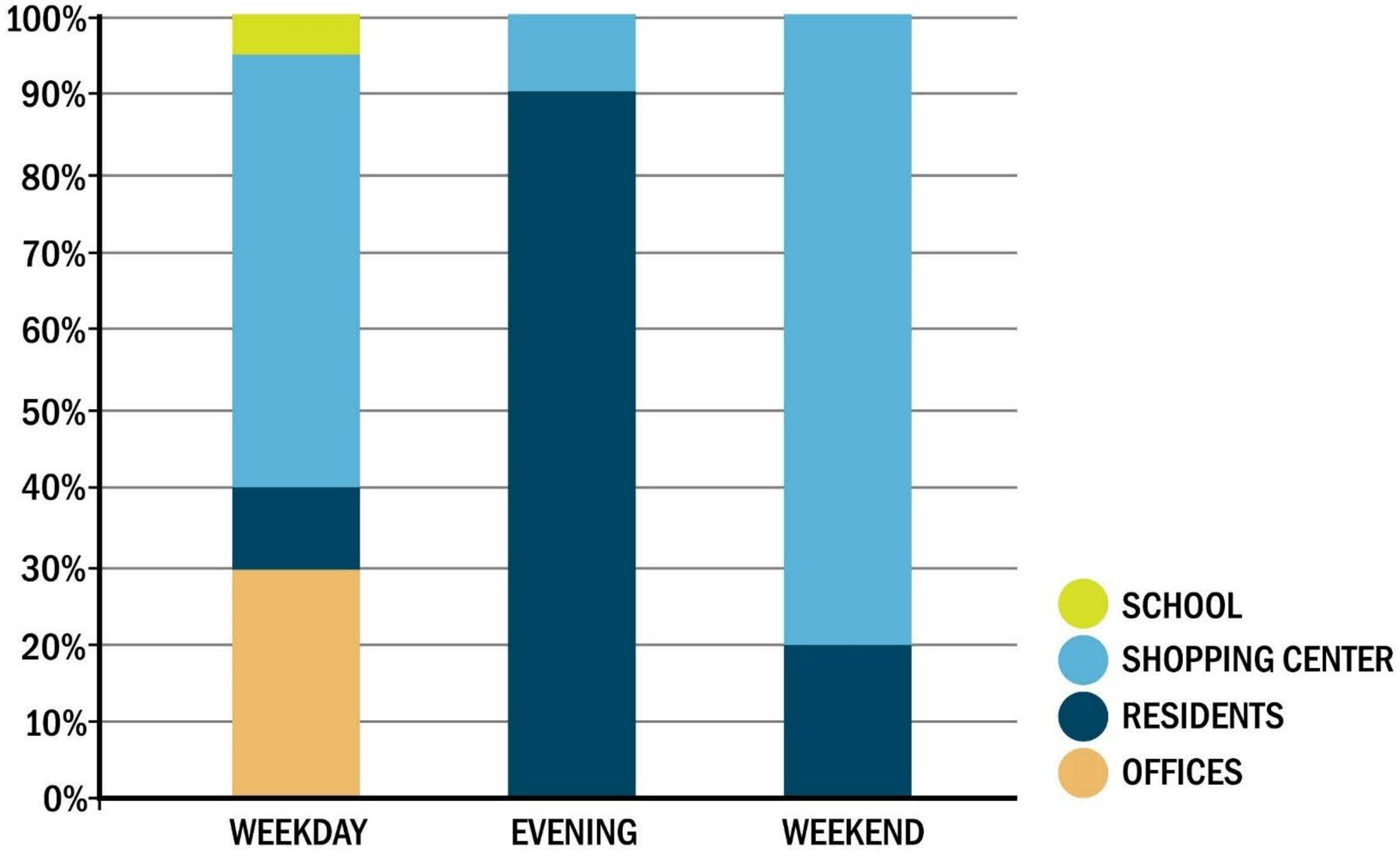
Many traditional malls, strip centers, big box malls, and single-use office parks are losing value

South Bay, Boston

Increasing density 300-400% often unlocks redevelopment. Housing, with retail, food and entertainment at “street” level is often the strongest market

South Bay, Boston

...shared parking strategies

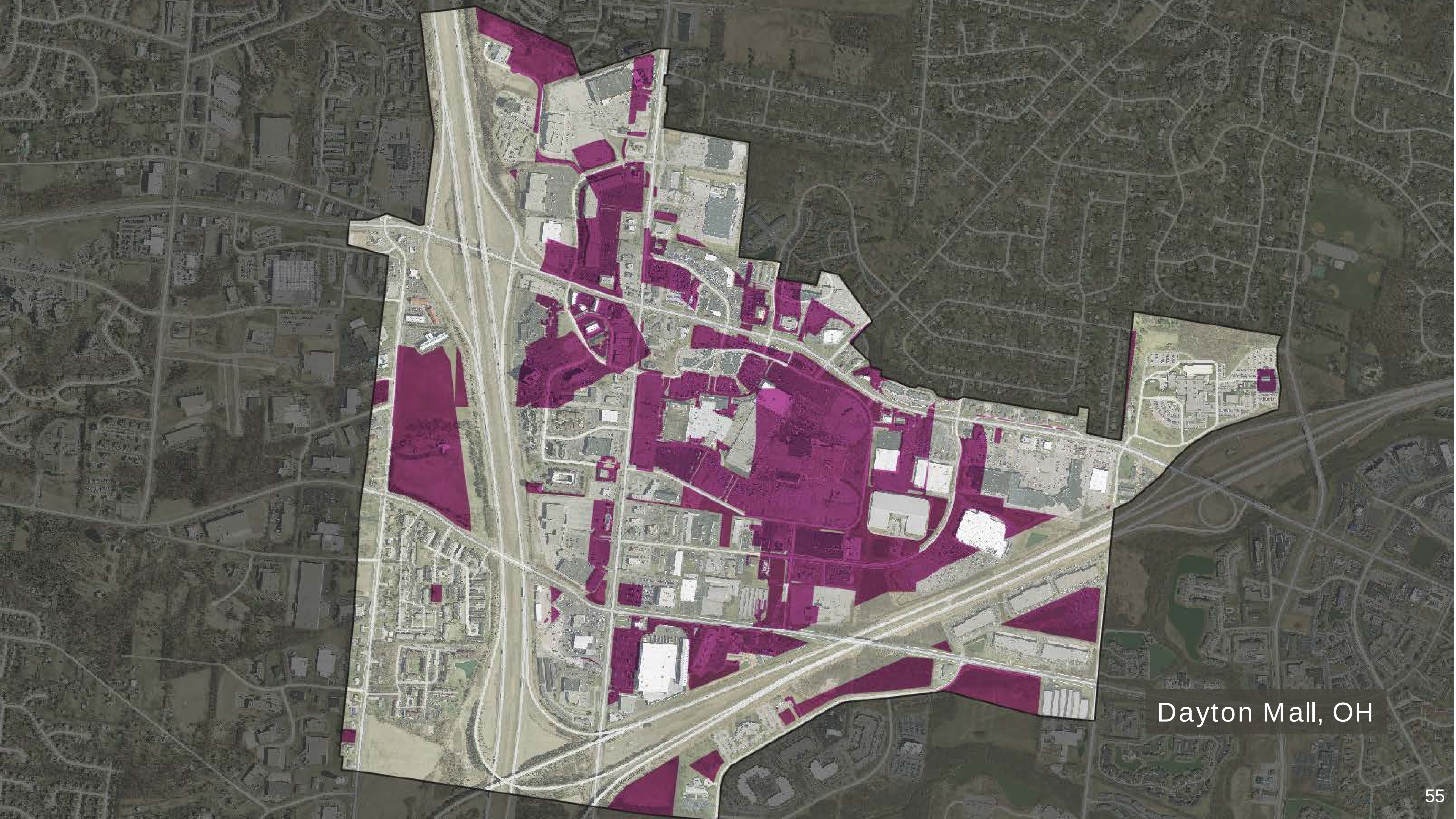


Walkable densities require structured parking—shared parking strategies can reduce expensive parking requirements 15-30%

...strategies that create opportunities for the market to get started

Dayton Mall, OH

Creating a new urban place is usually a market-driven, incremental process


Dayton Mall, OH

Year 1-3


Year 5-7
Dayton Mall, OH


Year 7-10
Dayton Mall, OH

Dayton Mall, OH

...strategies that make a new center the heart of the community

Tanglewood Mall, Roanoke VA

Town Center, Roanoke VA

Town Center, Roanoke VA

Discussion

principles for community-building:

walkability, connectivity, *multilayered* public realm, *diverse* choices…and authenticity

WALKABILITY

Made real with density, programming and design

Needham Street, Newton MA

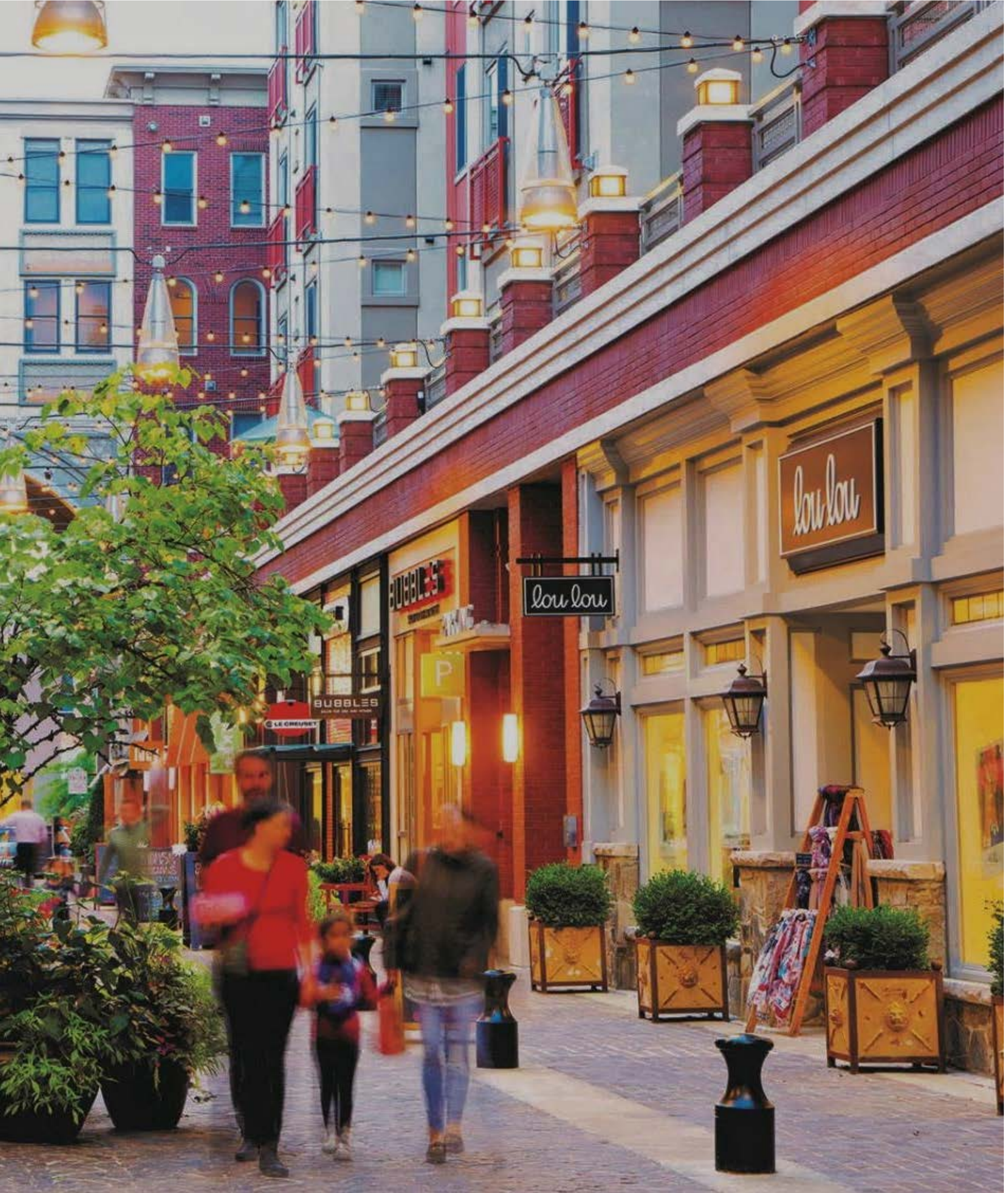
Close to 1000 housing units unlocks ability to attract “walkable retail”

Needham Street, Newton MA

Crystal City, Arlington VA

Crystal City, Arlington VA

The street level of some older buildings were retrofitted, while new retail was added in front of others to bring street's to life—and reverse declining office and residential values



Rockville Town Center MD

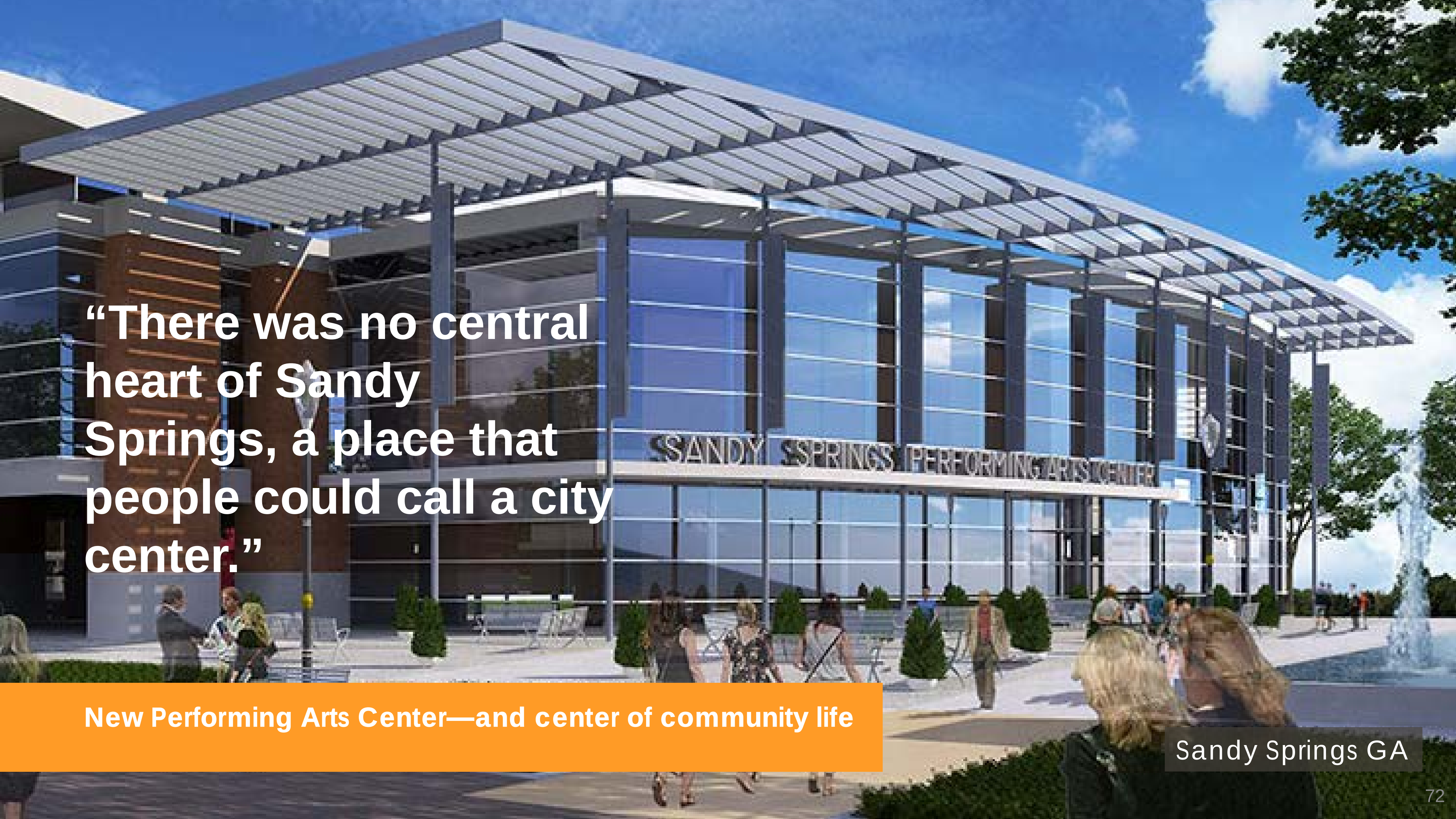
CONNECTIVITY

Linked to their communities physically and socially

Metro's underground route is visible in Arlington, VA's development patterns

Complete streets are growing more complete

Brooklyn Village, Charlotte NC



"There was no central heart of Sandy Springs, a place that people could call a city center."

New Performing Arts Center—and center of community life

Sandy Springs GA

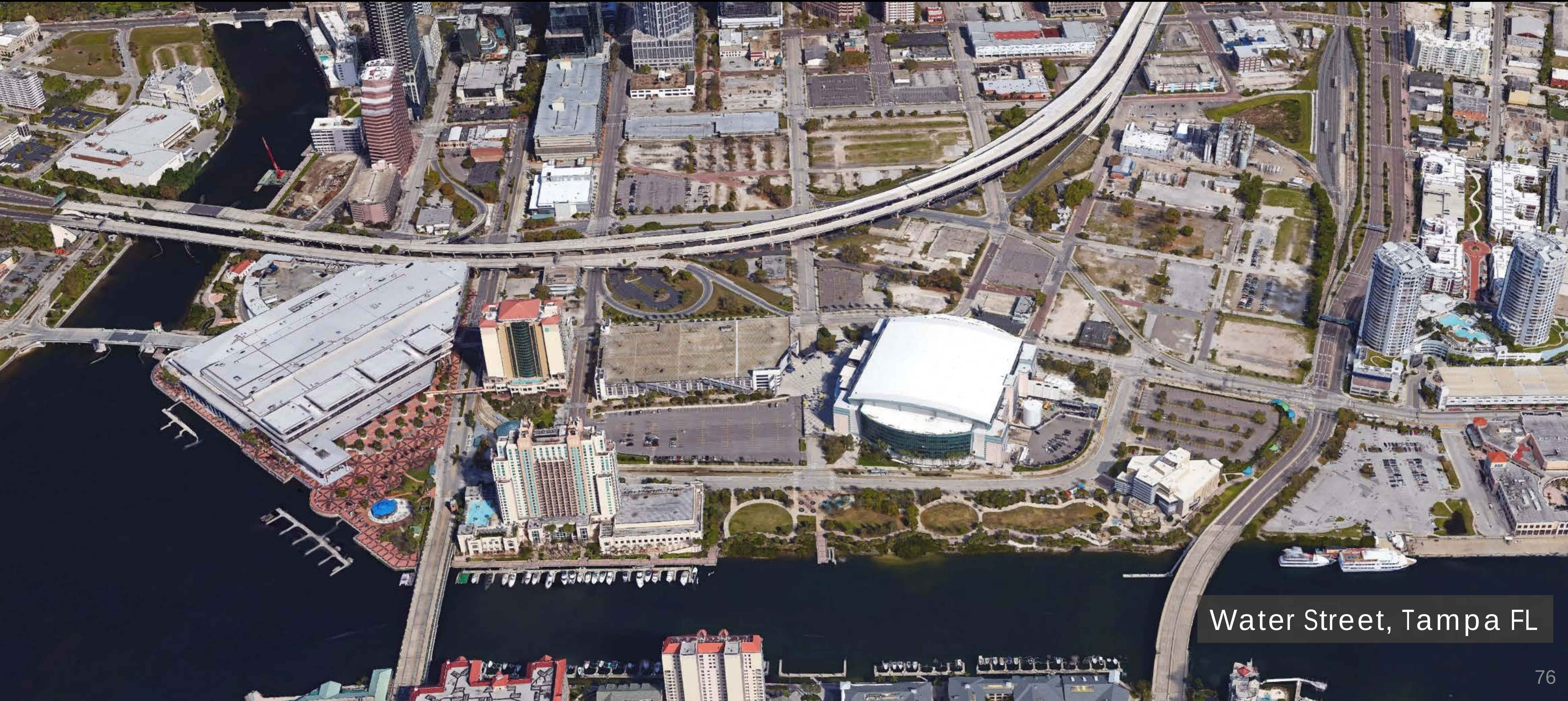
PUBLIC REALM

Multilayered—from places to reflect to lively squares


Reston Town Center VA
A continuous hierarchy of public spaces

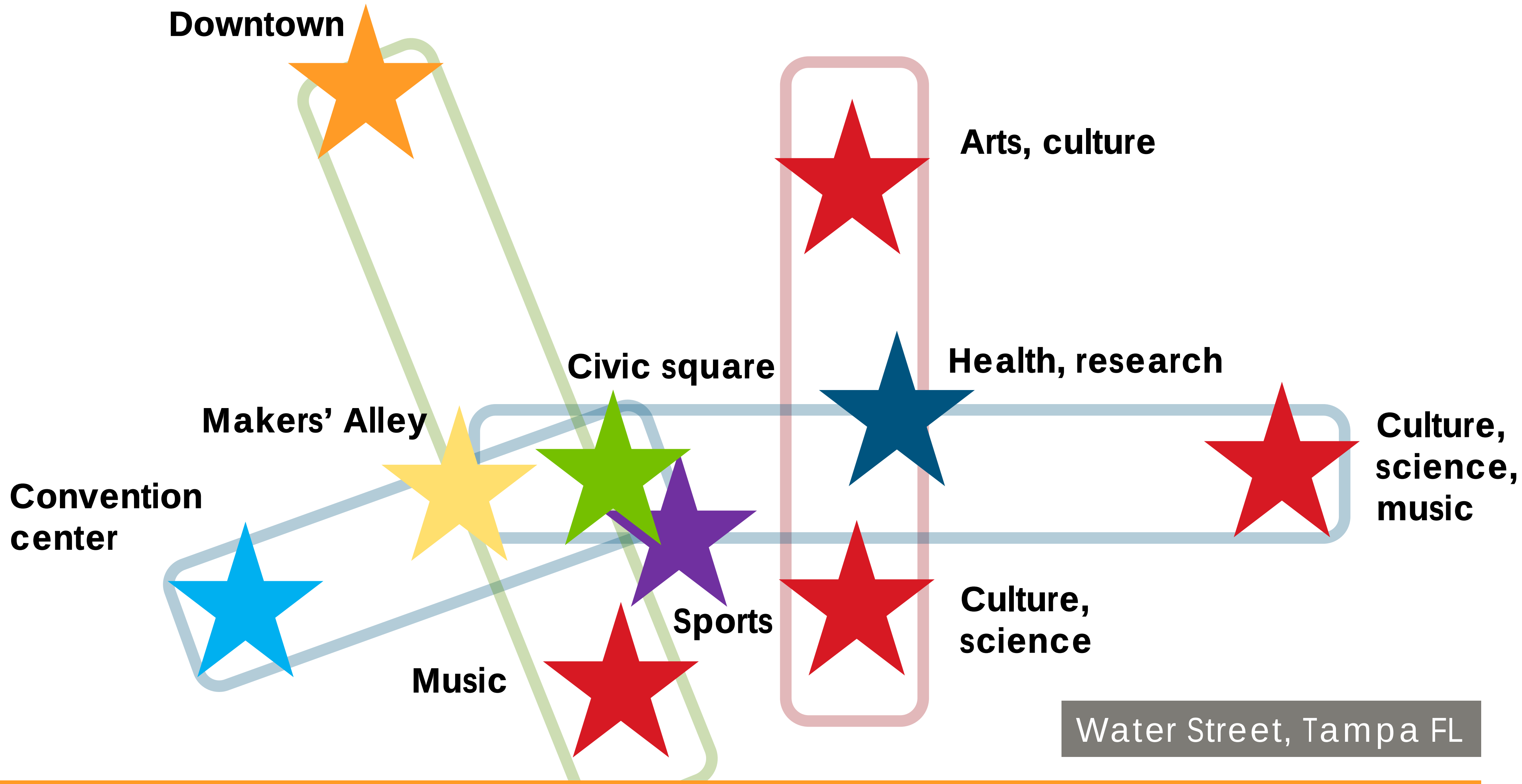
CHOICES

Diverse options to live, work, play, learn, celebrate...



Water Street, Tampa FL

Water Street, Tampa FL



A wide mix of activities touch many aspect of Tampa's social, economic, and cultural life

Water Street, Tampa

Water Street, Tampa FL

“Makers’ Alley” and new USF Medical School

AUTHENTICTY

Celebrate their communities’ stories and living culture

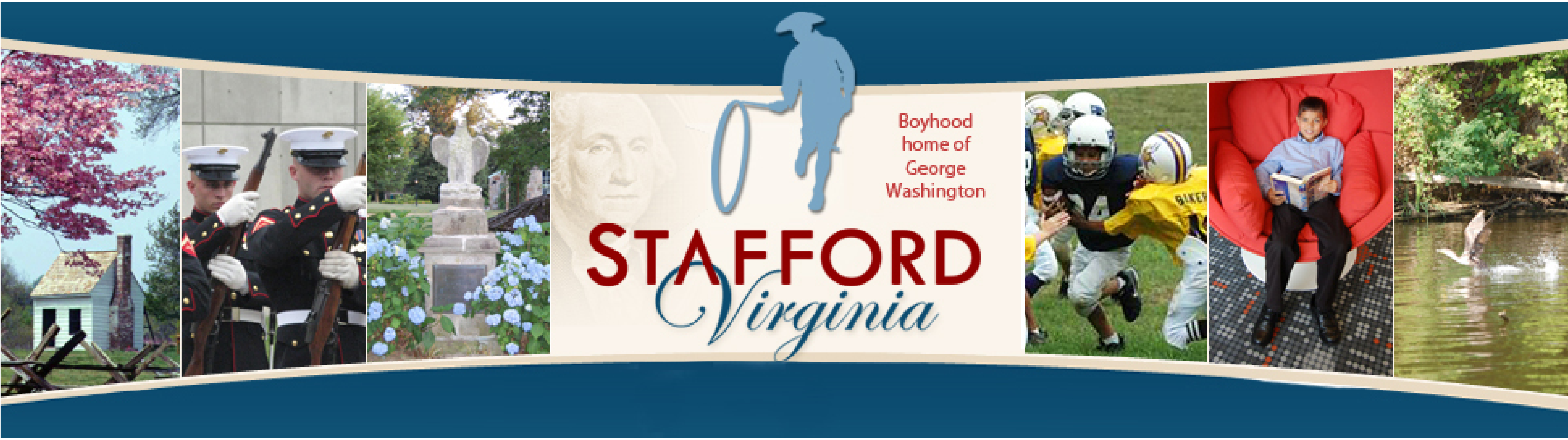
Water Street, Tampa FL

Belmar, Lakewood, CO

Maker spaces and artists’ working studios line an alley and parking garage

Robert E. Simon, founder of Reston

Regional Responses to National Trends



Regional Examples

Guided tour for County stakeholders in April included visits to:

- Kentlands (MD)
- Downtown Crown (MD)
- Rockville Town Center (MD)
- Fairfax Corner (VA)

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Tour Recap - Kentlands

Initial Reactions:

- "Allow living above retail (not in our zoning now)"
- "On-street [parking] is a good option"
- "Pedestrian access across Courthouse Road critical to our vision of this place"
- "Needed more green space – small park"

>1 million sq ft commercial + 1,800 homes on 350 acres. Completed 1990.

Tour Recap – Downtown Crown

Initial Reactions:

- "Central square"
- "Mix of uses"
- "Multi-modal access paths"
- "Wider streets had more room for sidewalks[…] but wider streets meant cars can go faster"

260,000 sq ft retail (including 50,000 sq ft grocery) and 500 apartments on 20 acres. Downtown Crown completed 2014.

Tour Recap – Rockville Town Center

Initial Reactions:

- "Very walkable – great public space, good scale"
- "Sidewalks were fairly wide and building height did not overwhelm"
- "Good feel – in spite of the six stories"
- "Great parking guidance system"

>180,000 sq ft retail + 650 housing units in 12.5 acre downtown. Completed 2007.

Stantec GREYSTONE

Tour Recap – Fairfax Corner

Initial Reactions:

- "Main Street layout for a shopping center is nice"
- "Include a community use"
- "I don't like how housing was separate"
- "A little heavy on surface parking fields – would be a waste of space in Stafford"

>500,000 sq ft development including retail, office, housing.

Stantec GREYSTONE

Post-Tour Comments

- “I was very surprised at how much I liked the higher developments. It seems a better use of space.”
- “I now feel that mixing the project into surrounding community could be a good design decision.”
- “Including a community amenity would help the success.”

Additional Regional Example – Mosaic District

Lessons learned:

- Actively programmed gathering space: farmer's market, yoga, outdoor movies, splash pad, etc.
- Smart parking signage
- LEED for Neighborhood Development
- Curated mix of local and national retailers

>1.5 million sq ft development including retail, housing, entertainment, office. Phase 1 opened in 2012-3.

Stantec GREYSTONE

BREAK

Agenda – PART TWO

1. Vision, Strategies, and Conceptual Framework
2. Key Elements w/ Precedent Photos
3. Design Concept
4. Preliminary Feasibility

DISCUSSION

5. Next Steps

DISCUSSION

Downtown Stafford

Downtown Vision

Vision for Downtown Stafford

- Establish a **walkable**, **vibrant**, **authentic** town center
  - Amenities, pedestrians and bikes, connected to neighborhoods
  - Acknowledge car-dependent realities of market

- Introduce a **heart for the community**
  - Signature 'place' that represents Stafford's culture and values

Strategies for Downtown Stafford

- **Density** to support 'critical mass'
- **Housing choices**
- **Retail and amenities** that drive activity
- **Signature town square** with regular programming
- **Community-rich public spaces**
- **Walkable and bike-able streets**, shared parking, and connections to neighborhoods
- **Connection across Courthouse Road** to government center, particularly retail and parking

Downtown Stafford

Downtown Design Framework

Conceptual Framework

Connect across Courthouse Rd

Mix of uses: Housing, retail, office

Retail/active sidewalks

Town square/ active public realm

Green edge/ multi-use trail

Anchor destination

Walkable, connected street grid

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Key Element: Multi-layered Public Realm

Flexible multipurpose open space defined by building edges

Key Element: Multi-layered Public Realm

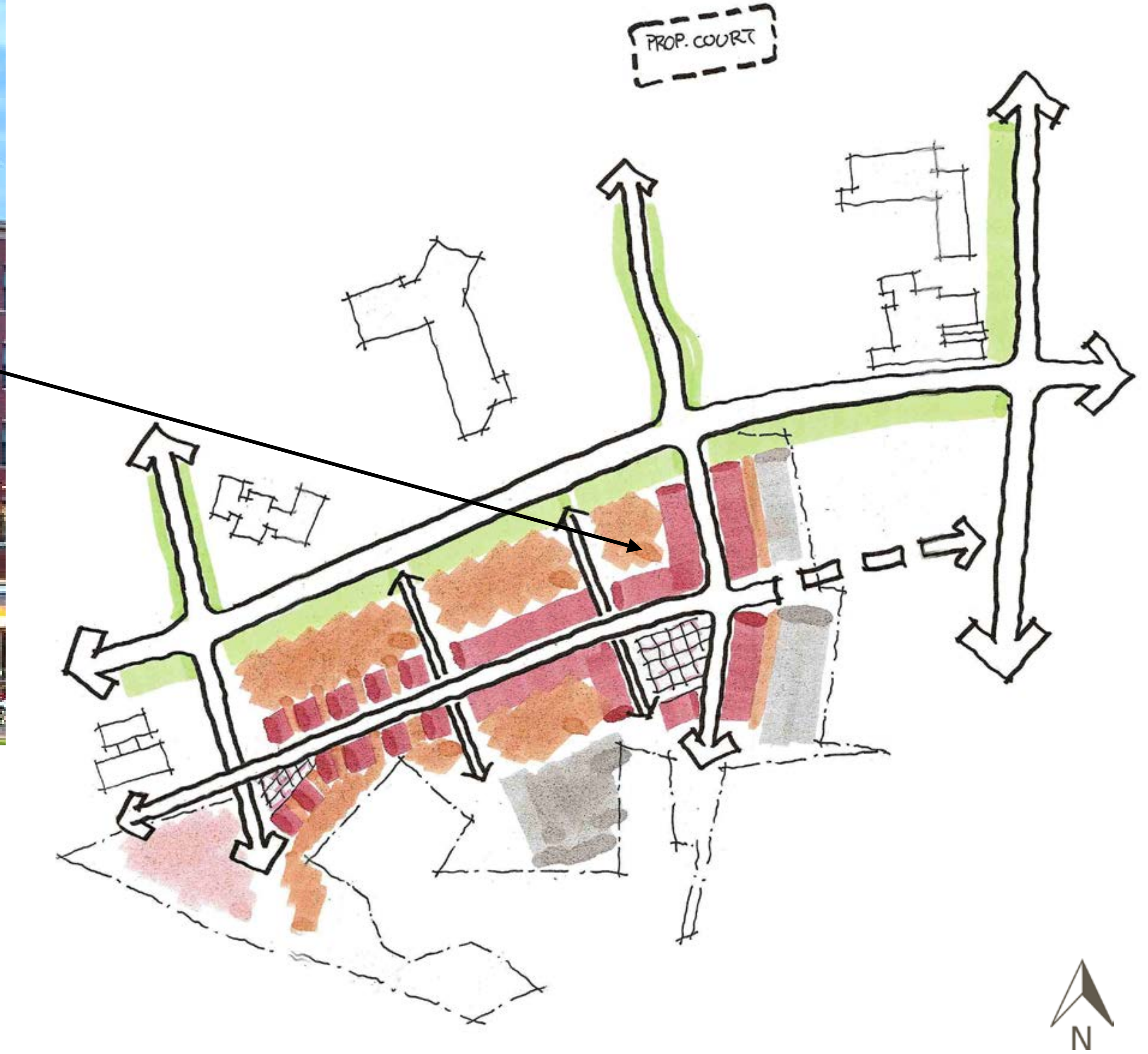
Outdoor dining and other places to rest and enjoy the activity

Key Element: Multi-layered Public Realm

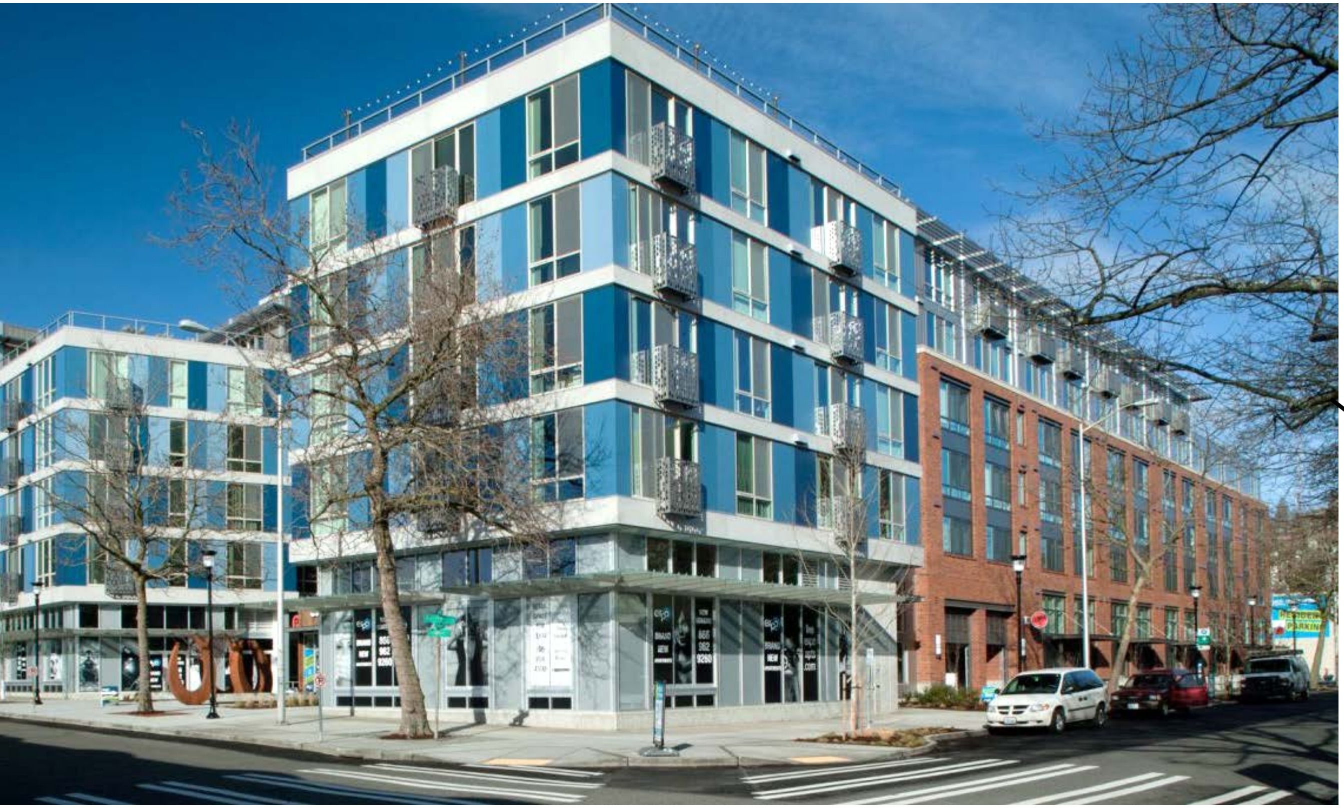
Programming critical: yoga, movie night, farmers market, art festivals, etc.

Key Element: Housing Choices

Ensure a critical mass of residents living here



Key Element: Housing Choices



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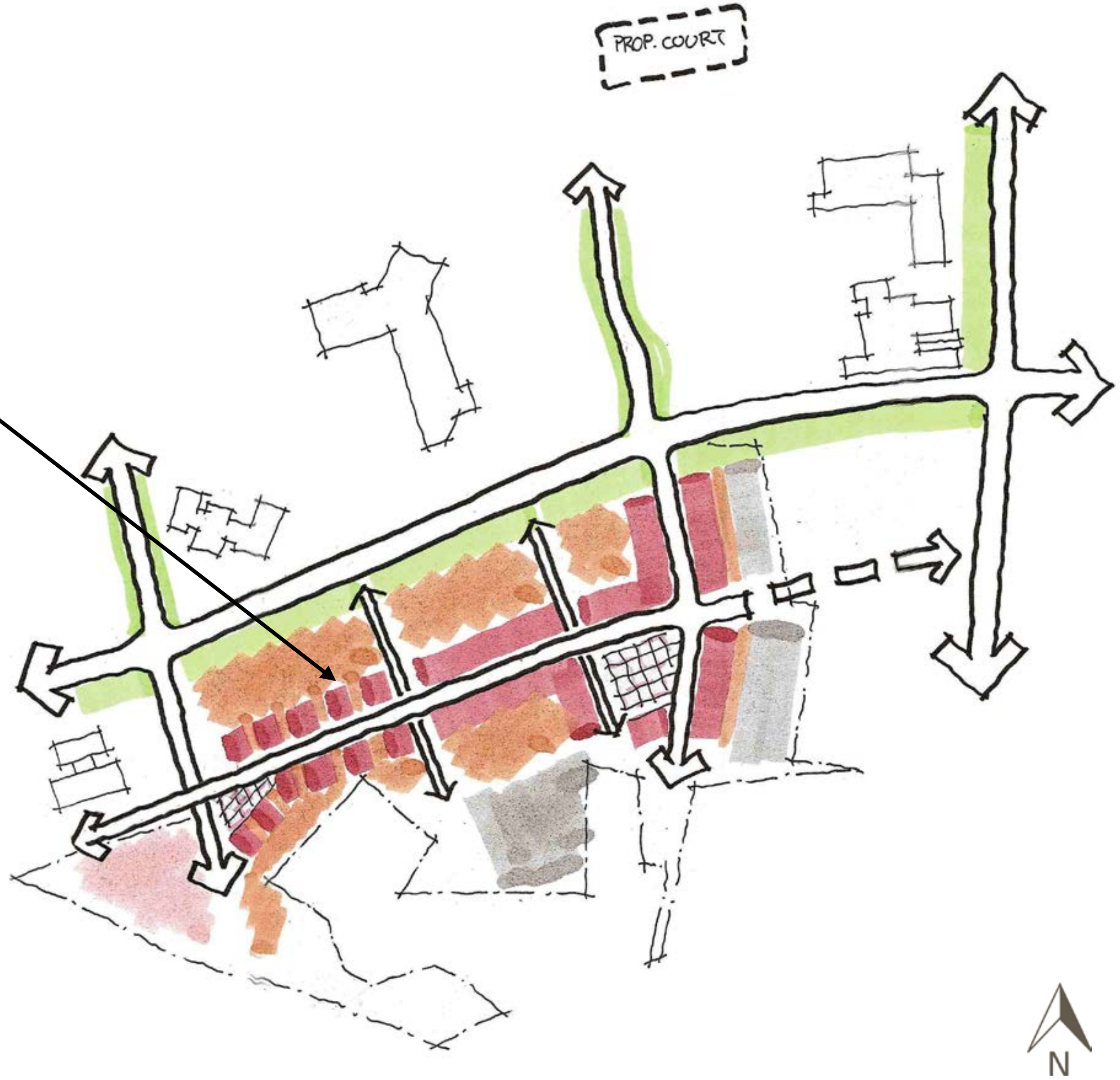
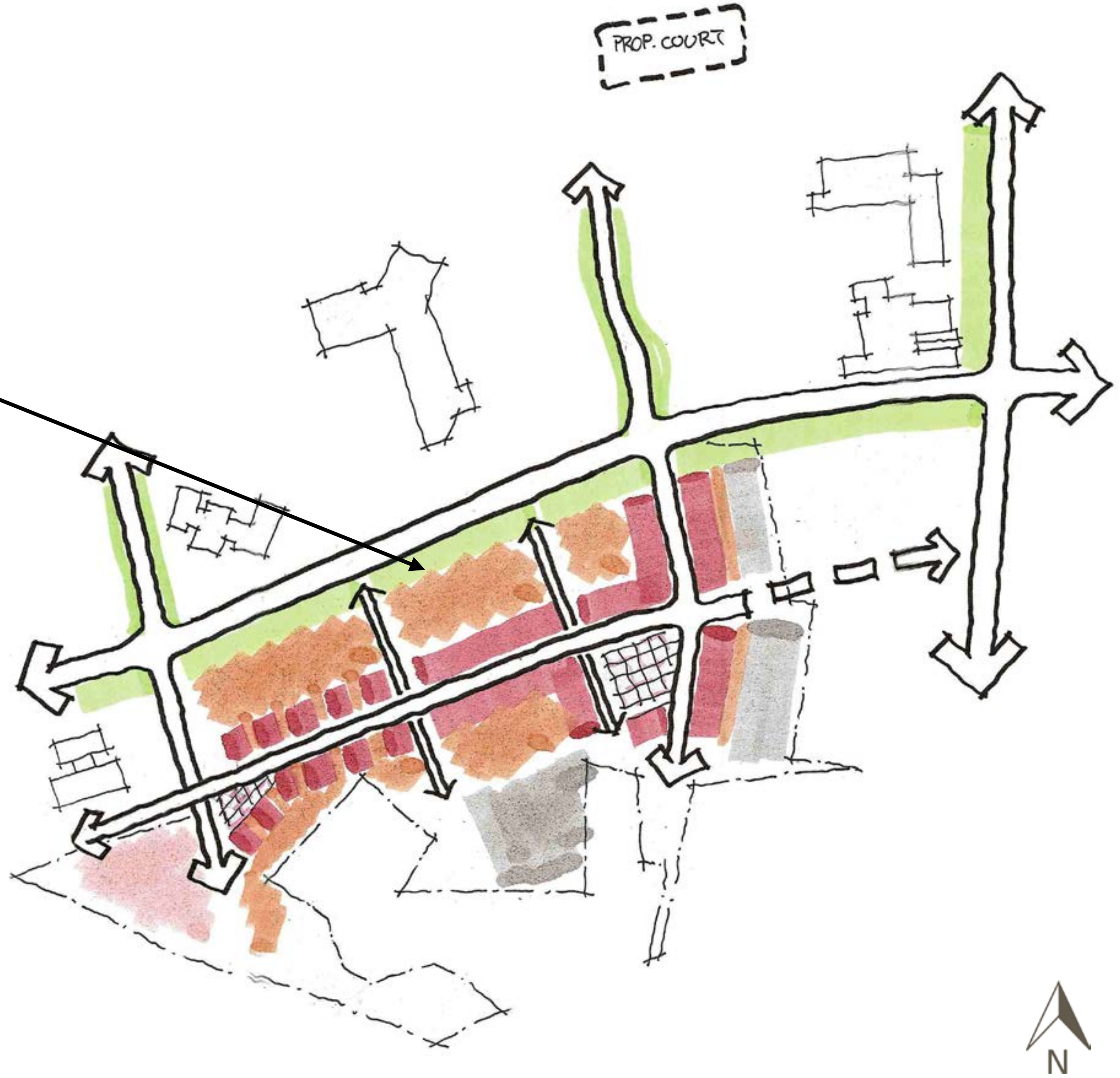


Key Element: Connectivity

Front setback with gardens, landscape, individual unit entrances at ground level



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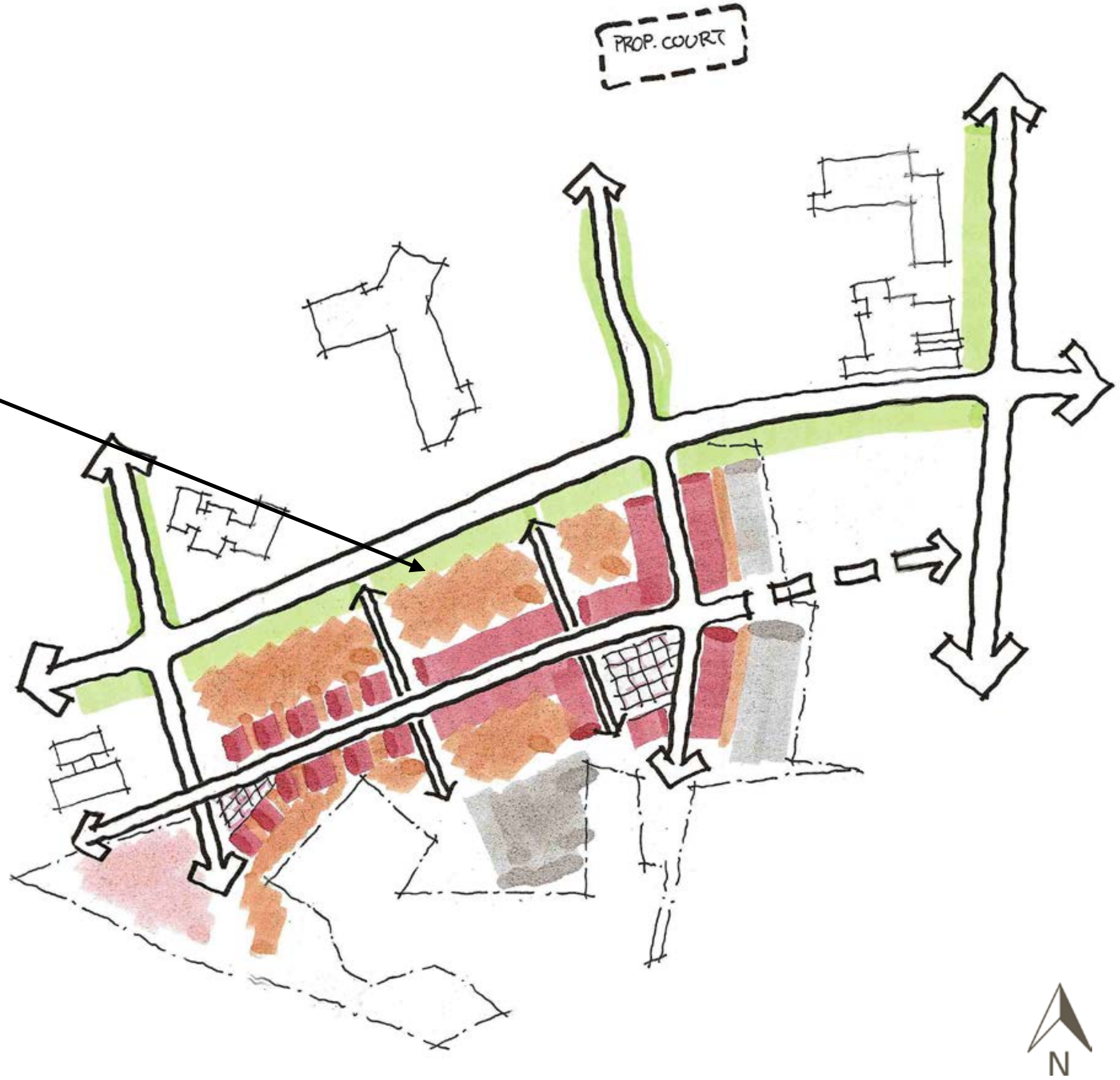
Key Element: Connectivity

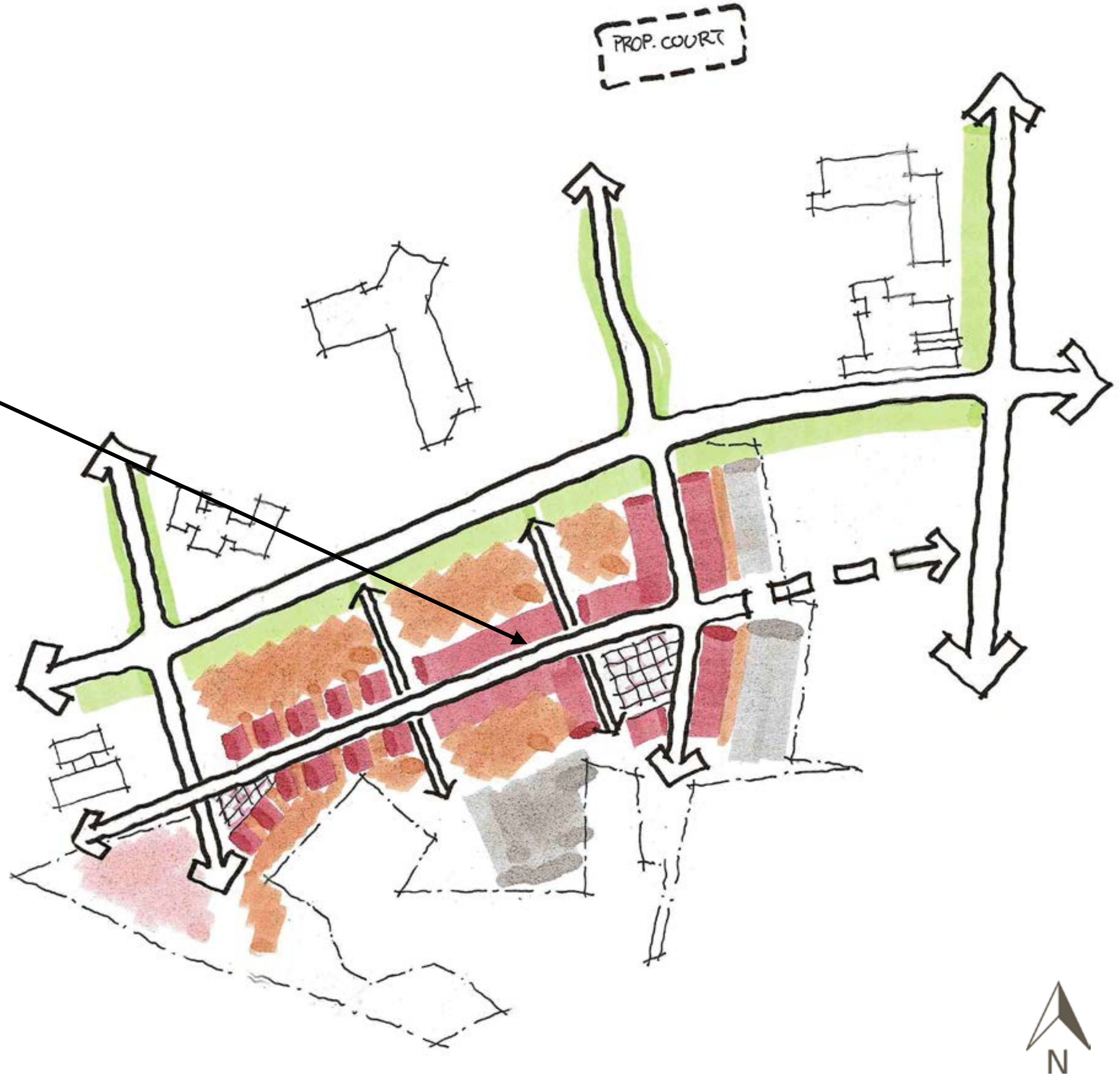


Connect to neighborhoods, encourage active transportation

Key Element: Walkability

Inviting sidewalks with shade trees, café seating, storefront awnings, benches, pedestrian lighting

Key Element: Walkability

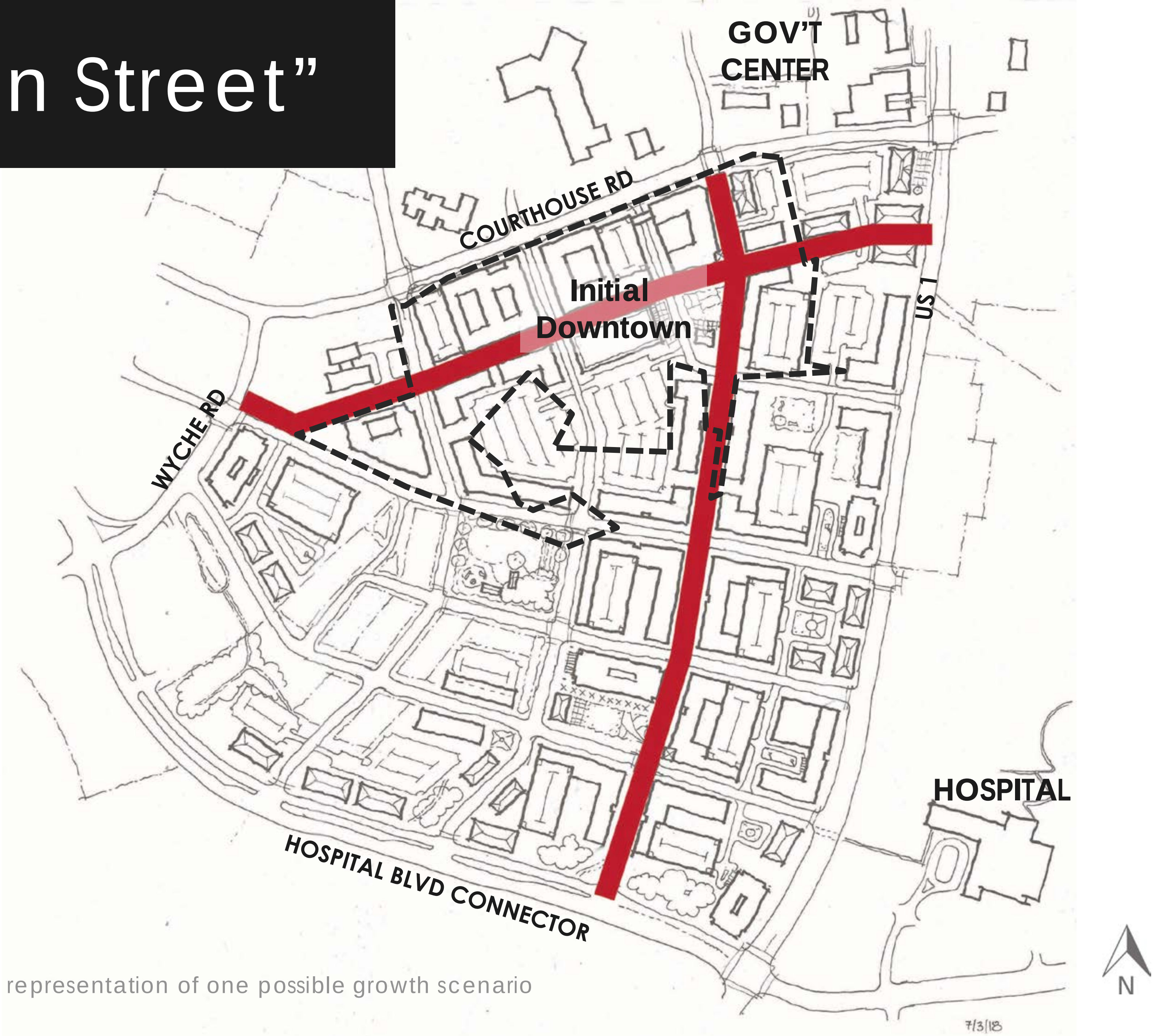


Calm streets with on-street parking, narrow lanes, crosswalks, street trees to slow cars

Expansion of "Main Street"

A successful initial phase should stimulate organic growth

- Partnerships
- Public Engagement
- Transformative Planning
- Leadership

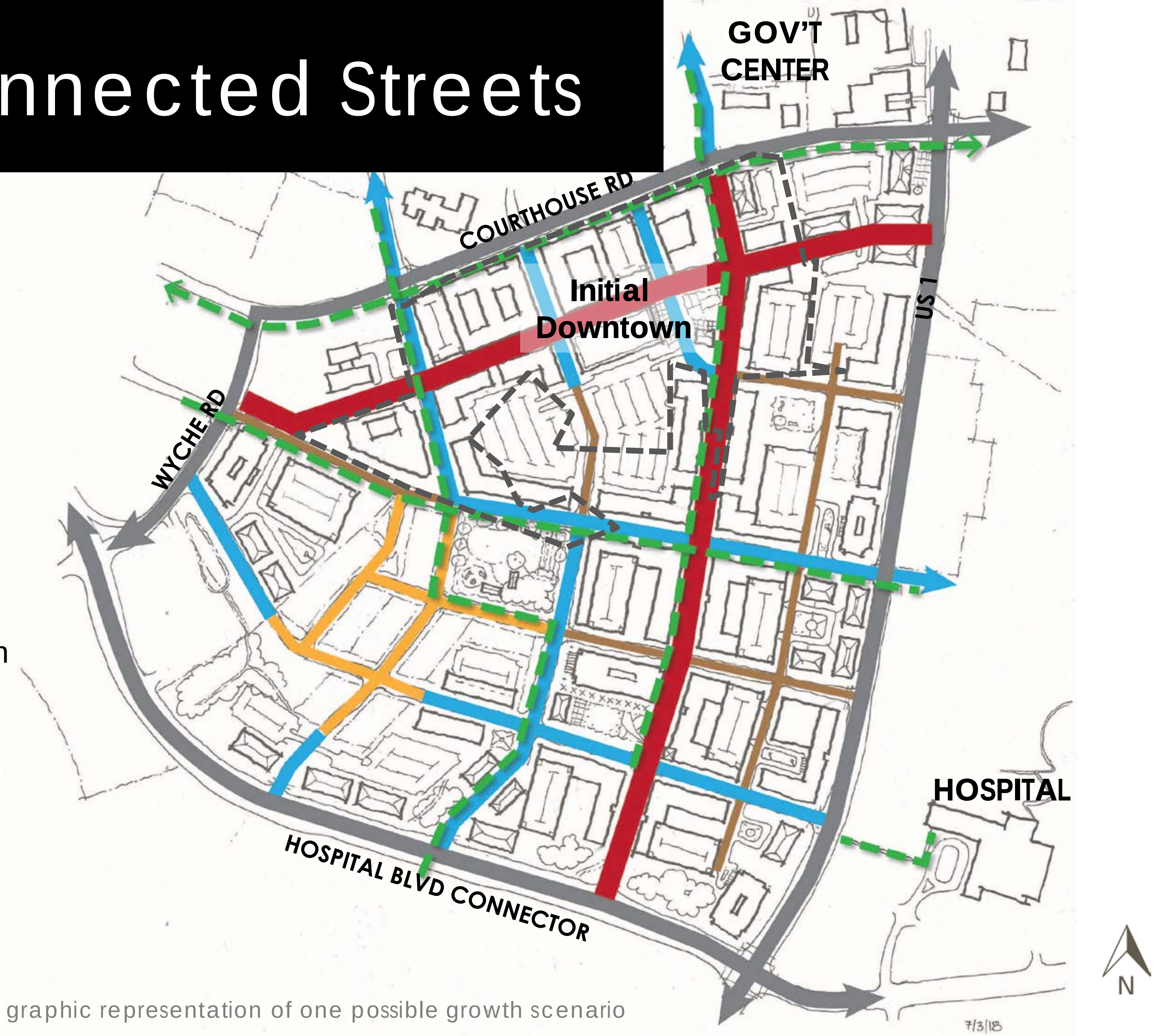


NOTE: This is a graphic representation of one possible growth scenario

Walkable and Connected Streets

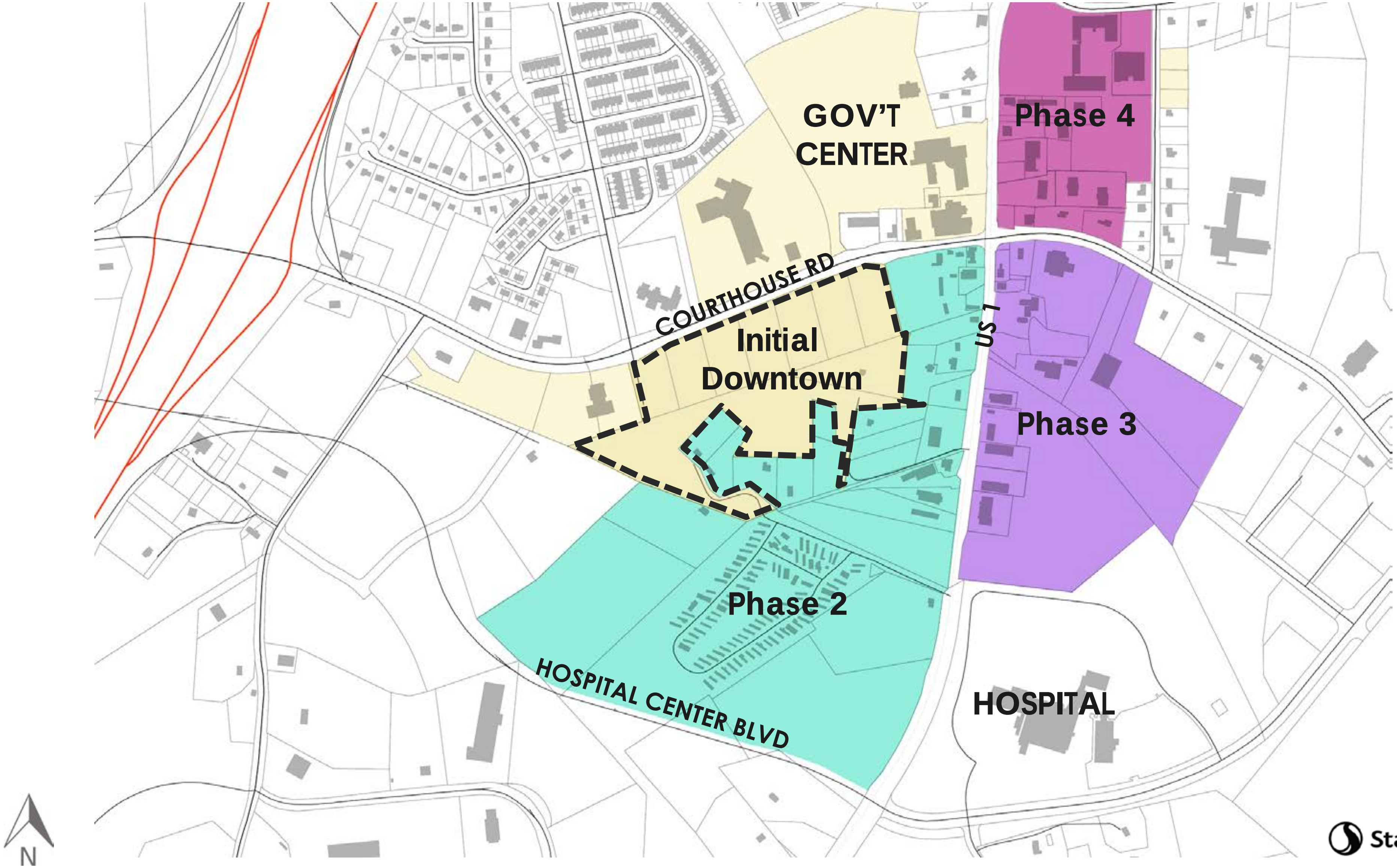
Street hierarchy

- **Primary retail street**: most walkable, best streetscape, active edges
- **Secondary streets**: also walkable, mix of ground floor uses, limited parking access points
- **Residential streets**: small-lot single-family or townhouses
- **Service streets**: parking access, etc
- **Multi-use trail**: off-street bike/ped path connecting to neighborhoods



NOTE: This is a graphic representation of one possible growth scenario

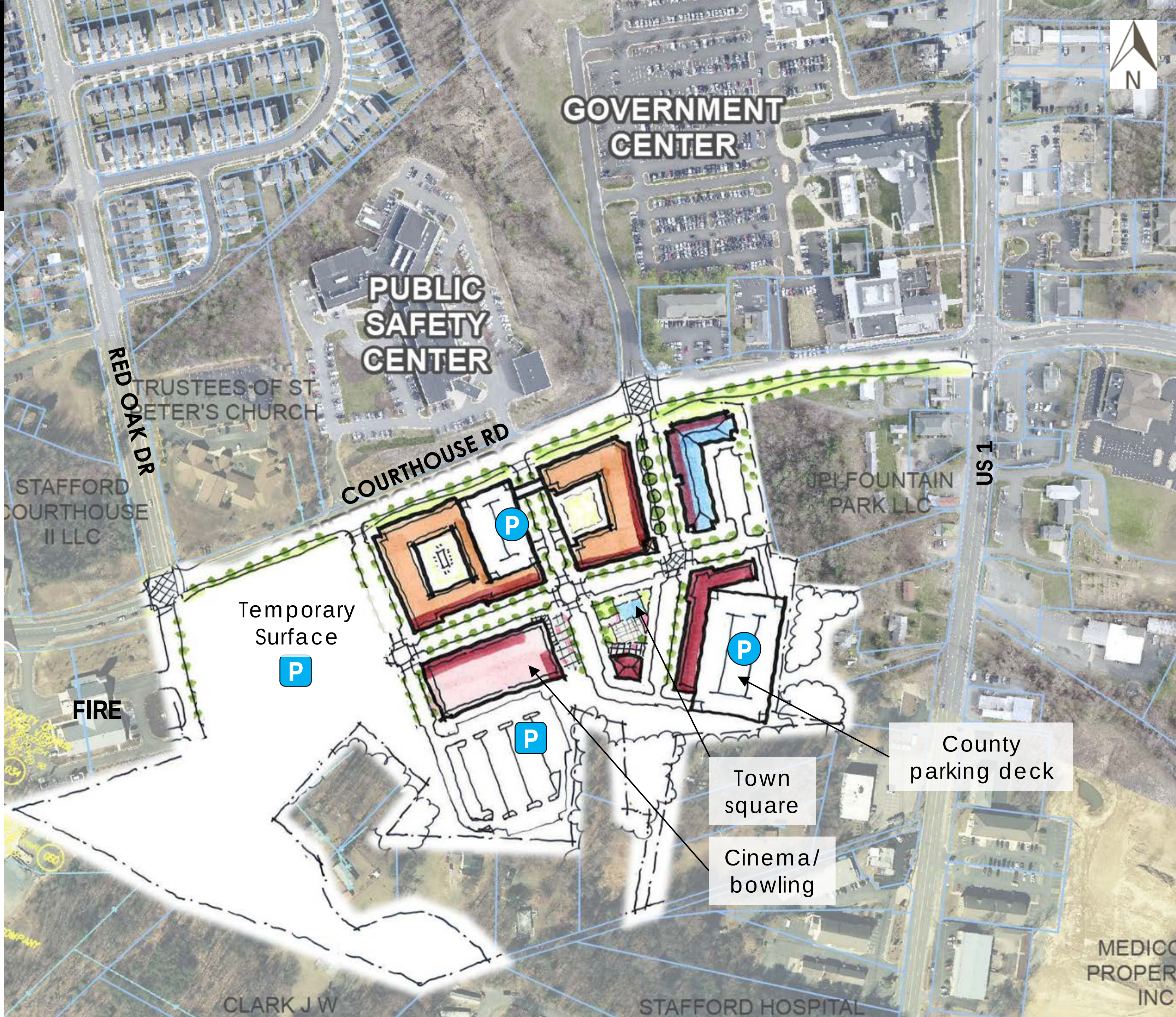
Potential Future Growth Pattern



Discussion

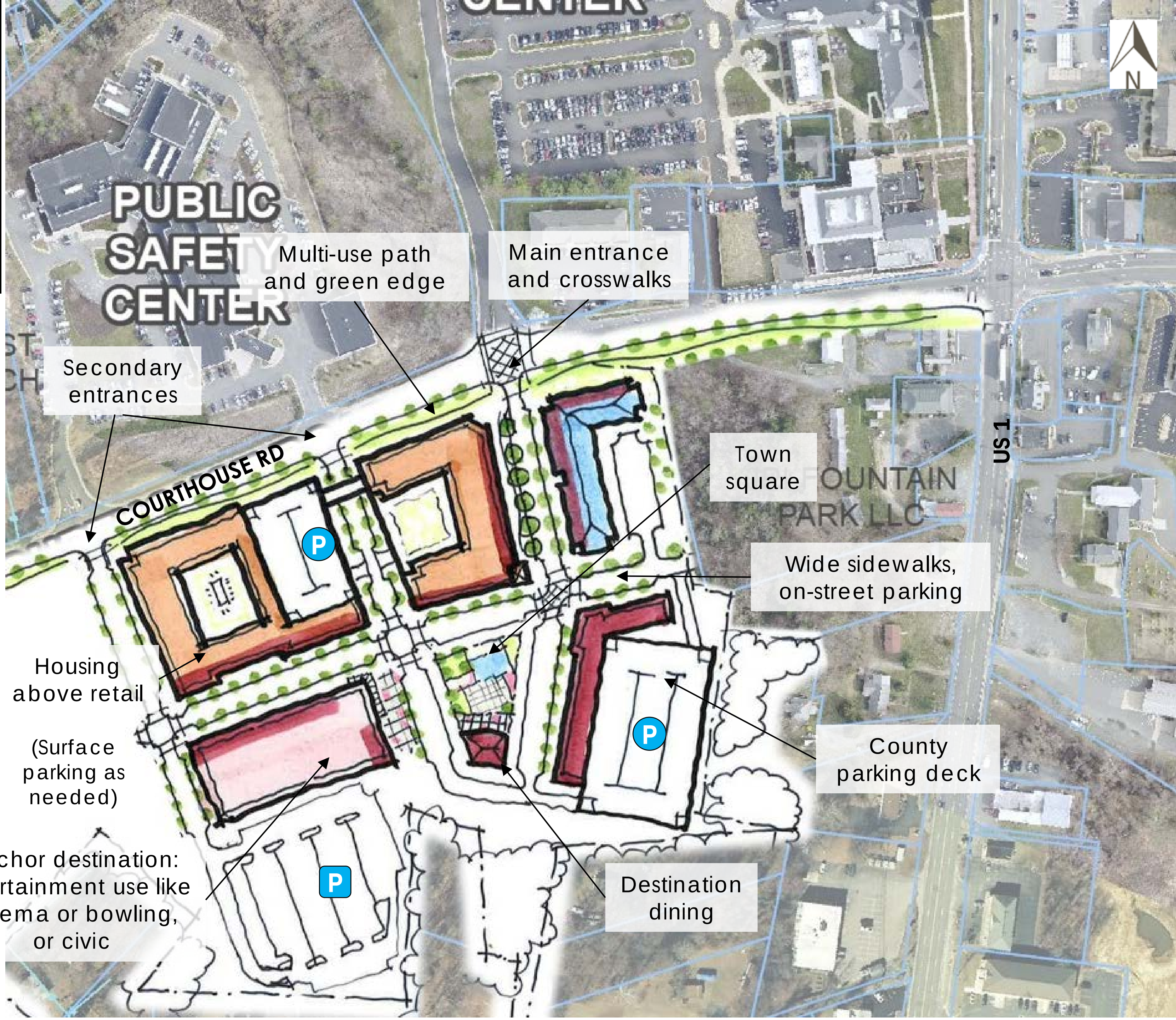
Conceptual Site Plan: Initial Phase

	PHASE 1
Housing	330 units
Retail	92,000 gsf
Office	38,000 gsf
Civic/ Entertainment	35,000 gsf Entertainment
TOTAL	**530,000 gsf**
Parking Supply P	640 spaces + county deck (570)



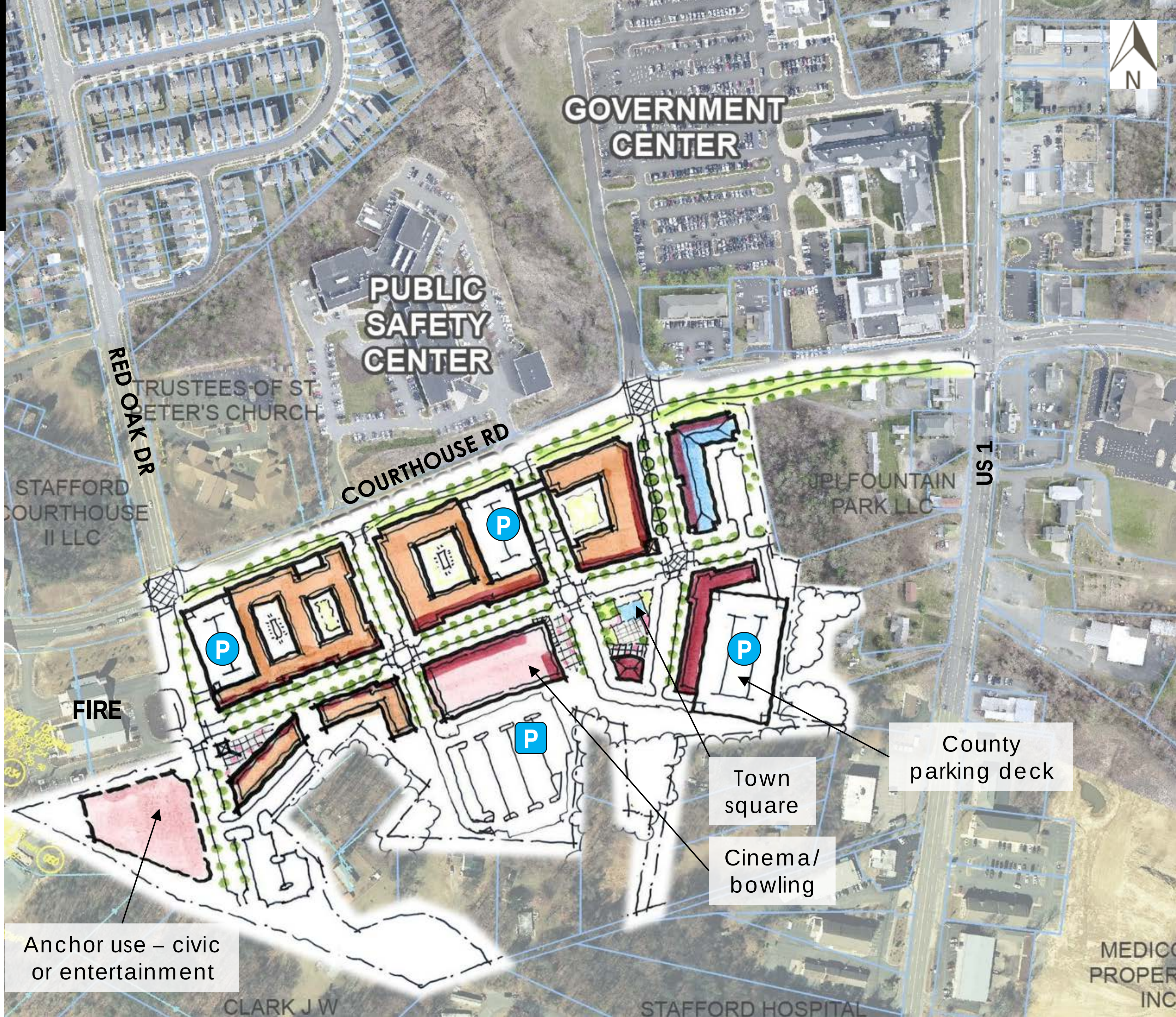
Conceptual Site Plan: Initial Phase Detail

- **Town square** as anchor and magnet
- **Retail and dining** creates lively sidewalks
- **Housing** on upper floors provides critical mass of residents
- **Off-street connections** to neighborhoods
- **Shared parking** on-street, in structures, and on surface lots



Conceptual Site Plan: Second Phase

	PHASE 1	PHASE 2
Housing (units)	330	365-410
Retail (GSF)	92,000	0-25,000
Office (GSF)	38,000	0-25,000
Civic/ Entertainment (GSF)	35,000 Ent.	50,000 Civic
TOTAL	**530,000**	**500,000**
Parking Supply (Spaces) P	640 + county deck	410

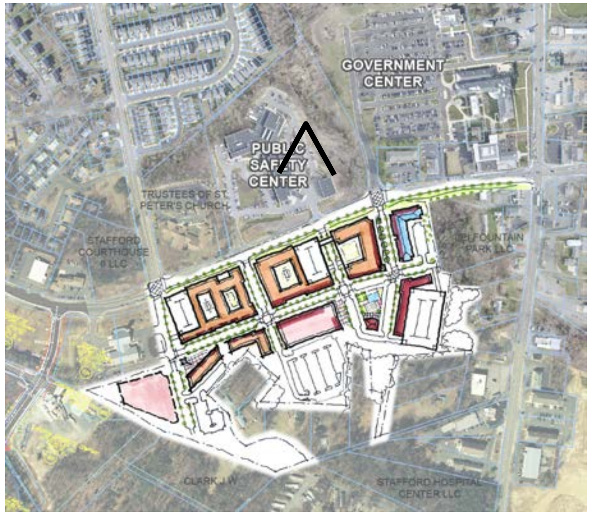


Conceptual Site Plan – Massing

Aerial view from south

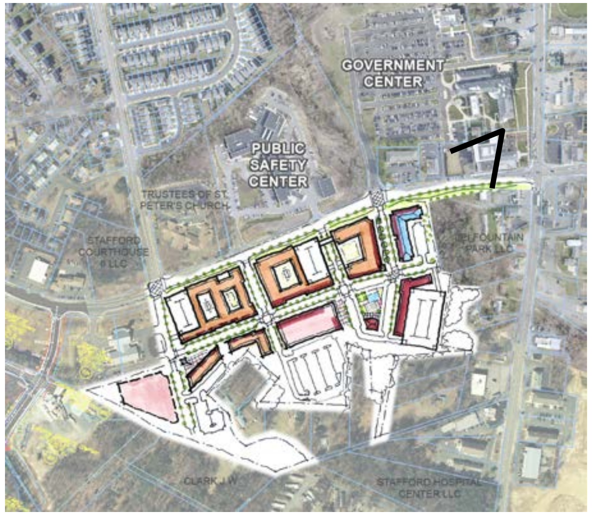
Conceptual Site Plan – Massing

Aerial view from north



Conceptual Site Plan – Massing

Aerial view from northeast



Town Square Conceptual Rendering

Downtown Stafford

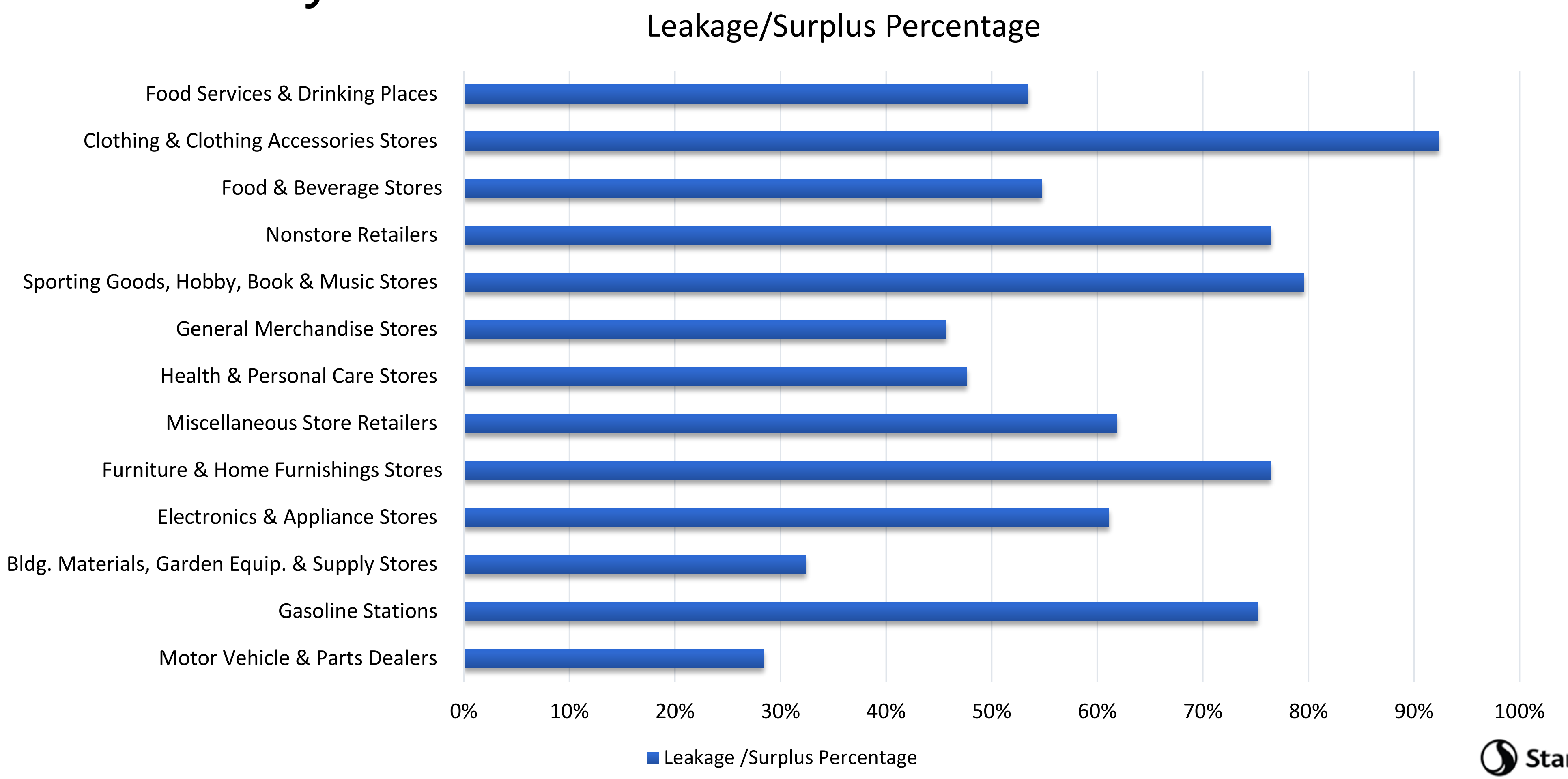
Preliminary Feasibility

Retail Gap Analysis

- Key to establishing a **walkable**, **vibrant**, **authentic** town center is inclusion of retail amenities such as shopping, entertainment & dining.
- To identify retail demand, we conducted a Retail Gap Analysis, which considers:
  - Population, demographics, retail supply & demand & other economic data
- Key Terms:
  - Gap/ Leakage – where market supply is less than market demand
  - Leakage occurs when retailers outside the market are fulfilling the demand for retail products

Retail Gap Analysis

Analysis indicates leakage among many retail categories in Stafford County



Retail Gap Analysis

- Median household income for Stafford County is $97,606 – significantly higher than Fredericksburg which hosts many of the retail opportunities that Stafford desires
- Higher median income along with findings of Gap Analysis indicate there is an opportunity for additional retail absorption in Stafford
- Retail Gap in Dollars:

Retail Gap/Leakage	Amount
Retail Spending in Stafford	$1.2 billion
Retail Potential in Stafford	$2.5 billion
Retail Gap in Stafford	$1.3 billion

Retail Gap Analysis

Retail Leakage in Dollars:

Leakage/Surplus factor by Industry	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage /Surplus Percentage	Number of Businesses
Food Services & Drinking Places	$ 251,546,844	$ 117,112,130	$ 134,434,714	53.4%	191
Clothing and Clothing Accessories Stores	$ 117,914,873	$ 9,036,858	$ 108,878,015	92.3%	14
Food & Beverage Stores	$ 396,909,138	$ 179,548,588	$ 217,360,550	54.8%	60
Nonstore Retailers	$ 42,943,465	$ 10,106,237	$ 32,837,228	76.5%	8
Sporting Goods, Hobby, Book, and Music Stores	$ 63,744,971	$ 13,028,849	$ 50,716,122	79.6%	18
General Merchandise Stores	$ 412,560,711	$ 224,039,735	$ 188,520,976	45.7%	18
Health & Personal Care Stores	$ 133,322,536	$ 69,803,088	$ 63,519,448	47.6%	31
Miscellaneous Store Retailers	$ 83,053,689	$ 31,670,208	$ 51,383,481	61.9%	51
Furniture & Home Furnishings Stores	$ 89,509,504	$ 21,110,654	$ 68,398,850	76.4%	21
Electronics & Appliance Stores	$ 75,479,359	$ 29,350,707	$ 46,128,652	61.1%	18
Bldg. Materials, Garden Equip. & Supply Stores	$ 158,886,575	$ 107,395,414	$ 51,491,161	32.4%	49
Gasoline Stations	$ 220,952,488	$ 54,807,672	$ 166,144,816	75.2%	19
Motor Vehicle & Parts Dealers	$ 485,715,930	$ 347,776,758	$ 137,939,172	28.4%	92

Financial Analysis

- Creation of a robust model to determine high-level development feasibility
  - Model inputs include assumptions such as vacancy rates, inflation rates, construction costs, rental rates, etc.
  - Market research identified construction costs, rental rates, etc., in the area
- Output metrics measured include IRR, Return on Investment, to determine likely developer interest

Assessment

- Assessment of conceptual plans shows potential for a successful project. IRR and Return on Equity in stabilized year are in range to meet returns that developers/investors seek.

- Have used “placeholders” for infrastructure costs—will refine

- Have not assumed any land payment in model, but current feasibility assessment would allow developer/bidders to propose land payment. Will study further

- Next steps for financial modeling:
  - Improve analysis of infrastructure assumptions
  - Continue to revise based upon modifications to conceptual plans
  - Conduct sensitivity analyses on construction costs, rental rates, and occupancy, etc.
  - Analyze outputs

Discussion

Downtown Stafford

Next Steps - Implementation

Implementation – Definition of Terms

- **Generalized Development Plan** (GDP) – plan for county-owned parcels that includes development guidelines for items such as street grid and placement of key assets. Also called Master Plan.
- **Small Area Plan** – plan for area bounded by Courthouse Road, Hospital Center Blvd, Wyche Rd, and Route 1.
- **Zoning** – the legal regulatory framework by which developments must abide.

Implementation

To achieve the vision of a **walkable, vibrant, authentic** town center that serves as the **heart of the community**, next steps include:

- Modifying the regulatory framework
  - Creating Generalized Development Plan (GDP) for County-owned parcels
  - Re-zoning County-owned parcels to UD-5
- Targeting greater density development
  - Amendment UD zoning district standards
- Bringing in a private developer

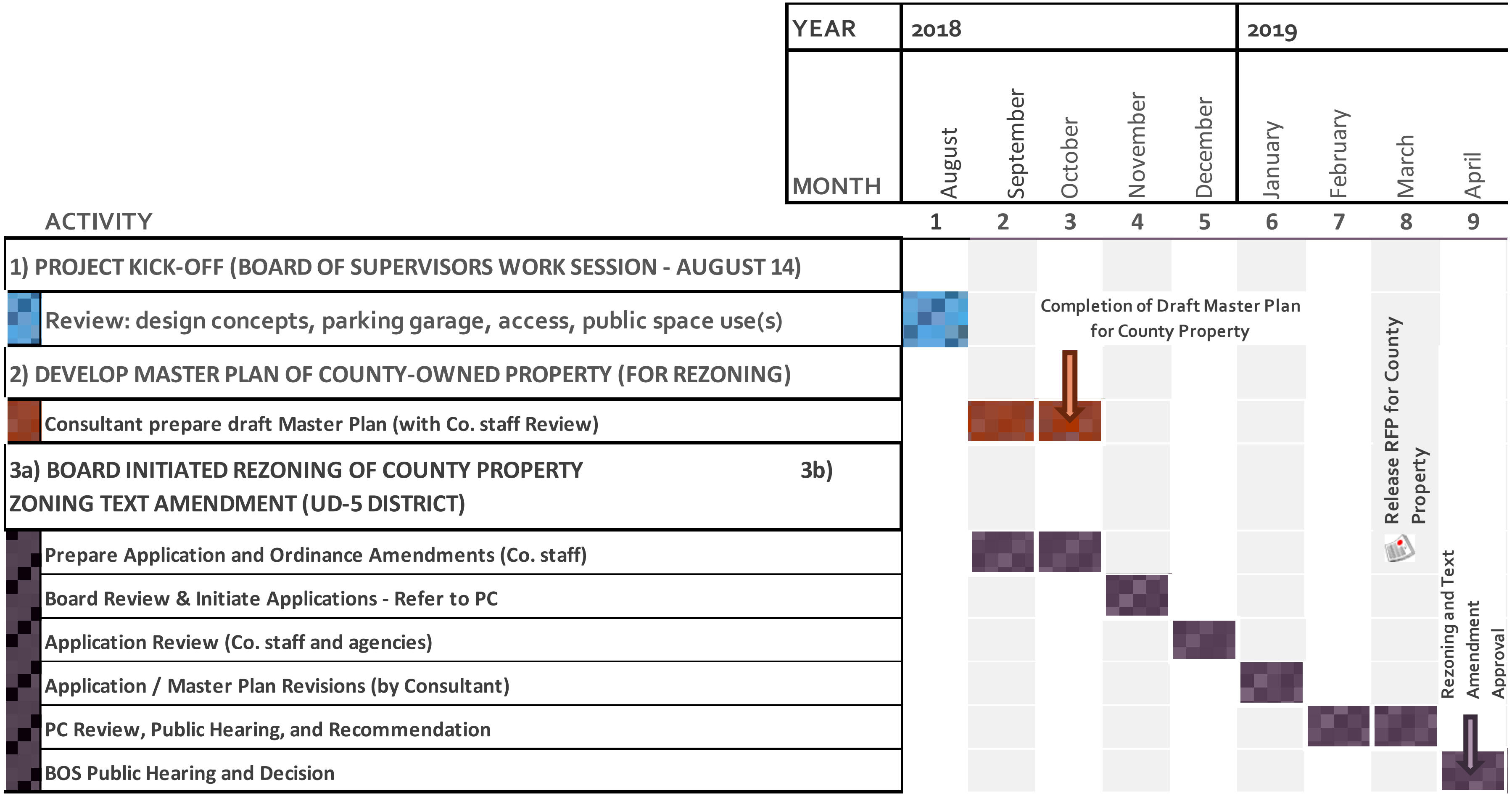
Implementation – Regulatory Framework

- Creating Generalized Development Plan (GDP) for County-owned parcels
  - Take conceptual plan to next level of detail
  - Creates framework of impacts for zoning
  - Board takes plan public
  - Approximately 3-month process

- Re-zoning County-owned parcels to UD-5 and amending UD standards
  - Identification of what within UD-5 should be adjusted (i.e. street design guidelines, density, etc.)
  - Preparation and review of Application
  - Public Hearing and Decision

  *Requires involvement of County Staff, Consultant Team, PC, and BOS

Implementation – Regulatory



Master Plan = GDP for County-owned parcels

Aim to condense Zoning duration

Implementation– Disposition of Parcels

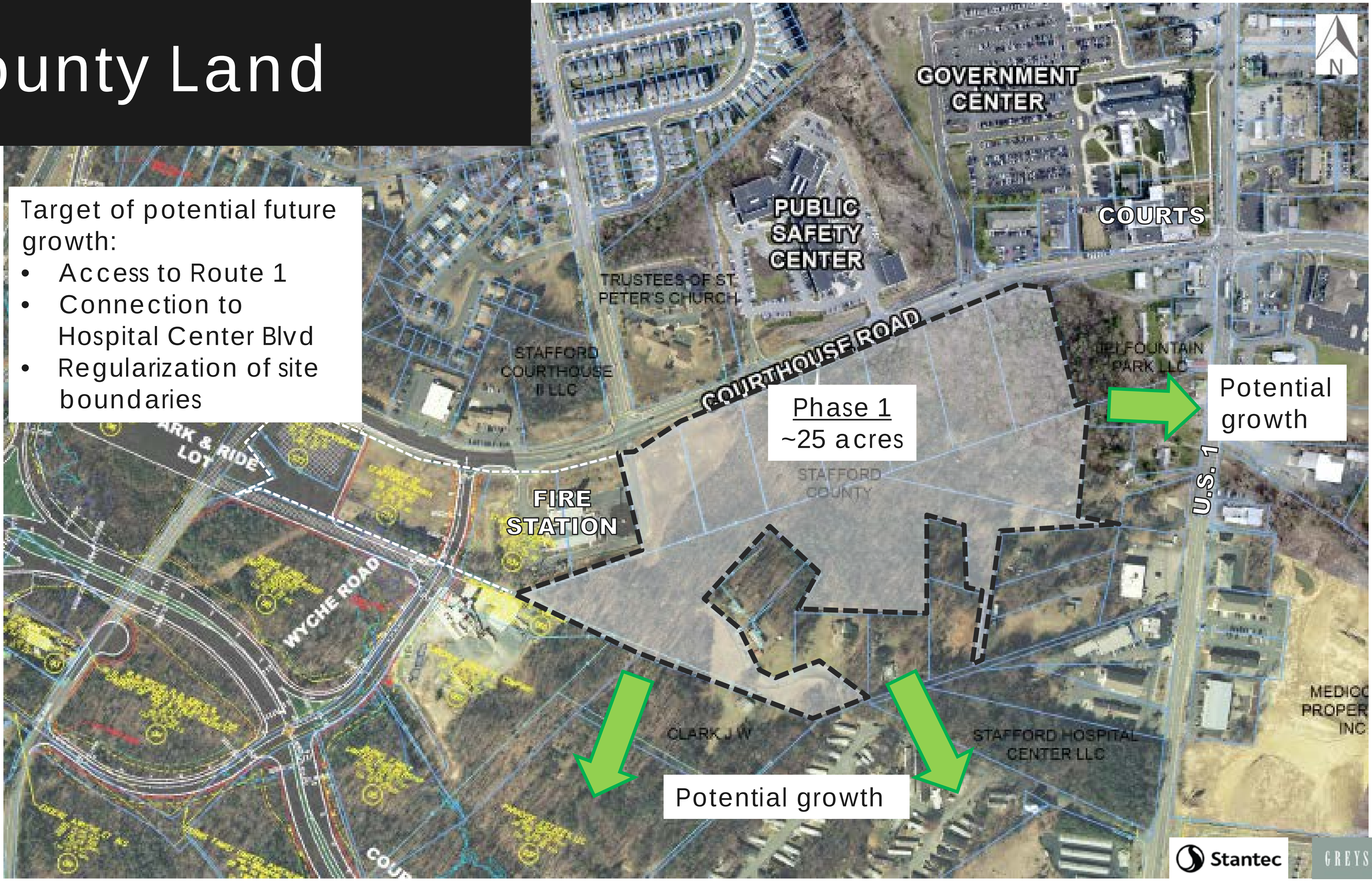
RFQ/RFP process

- Provide guidelines and objectives for most critical elements
- Leave as much developer flexibility as possible
- Target release of RFP – late Spring 2019 after zoning for County-parcels is updated

Downtown Stafford

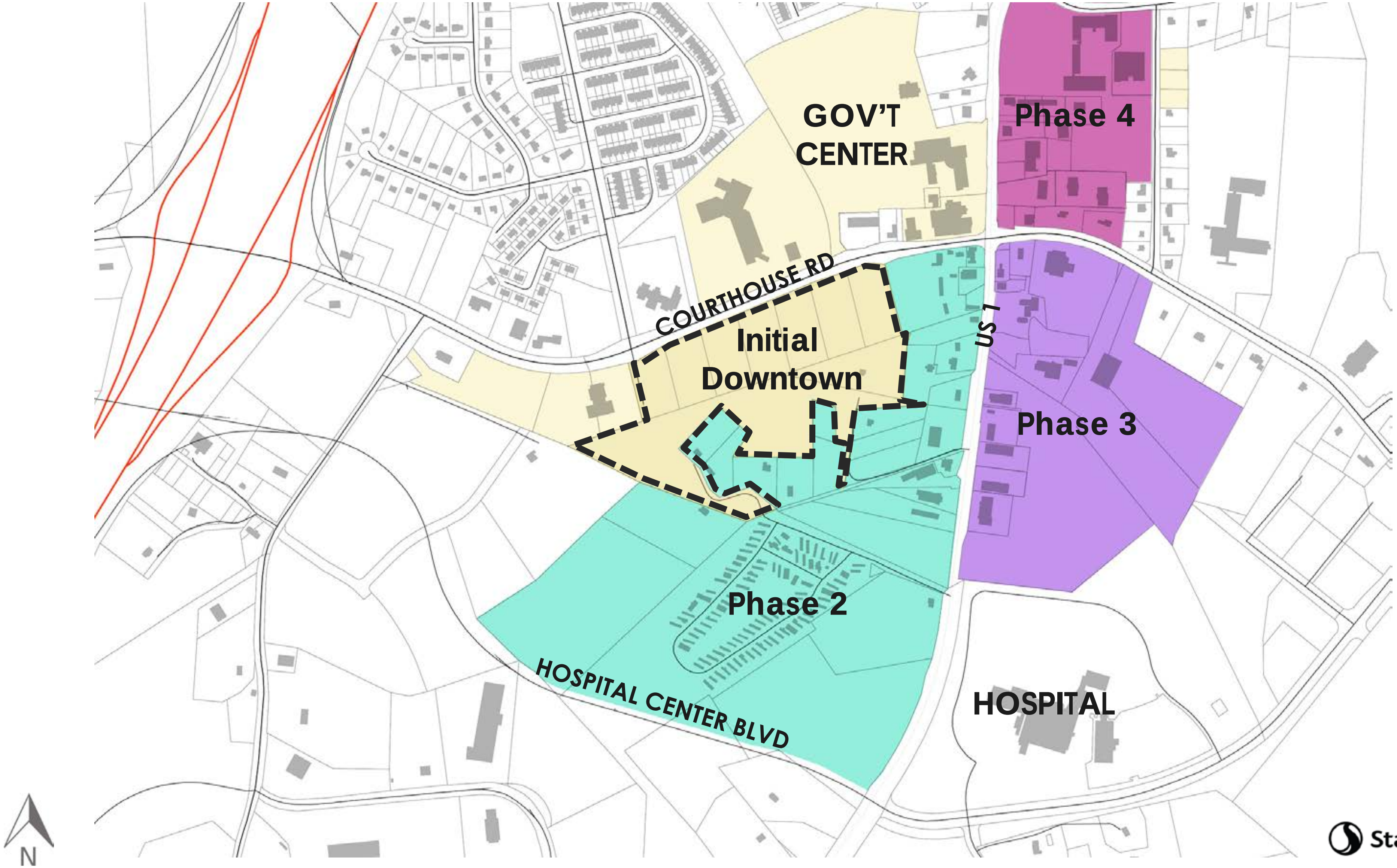
Future Growth Considerations

County Land



Target of potential future growth:
• Access to Route 1
• Connection to Hospital Center Blvd
• Regularization of site boundaries
Phase 1
~25 acres
Potential growth
Potential growth
GOVERNMENT CENTER
PUBLIC SAFETY CENTER
COURTS
TRUSTEES OF ST PETER'S CHURCH
STAFFORD COURTHOUSE II LLC
COURTHOUSE ROAD
FIRE STATION
STAFFORD COUNTY
WYCHE ROAD
CLARK J W
STAFFORD HOSPITAL CENTER LLC
U.S. 1
N

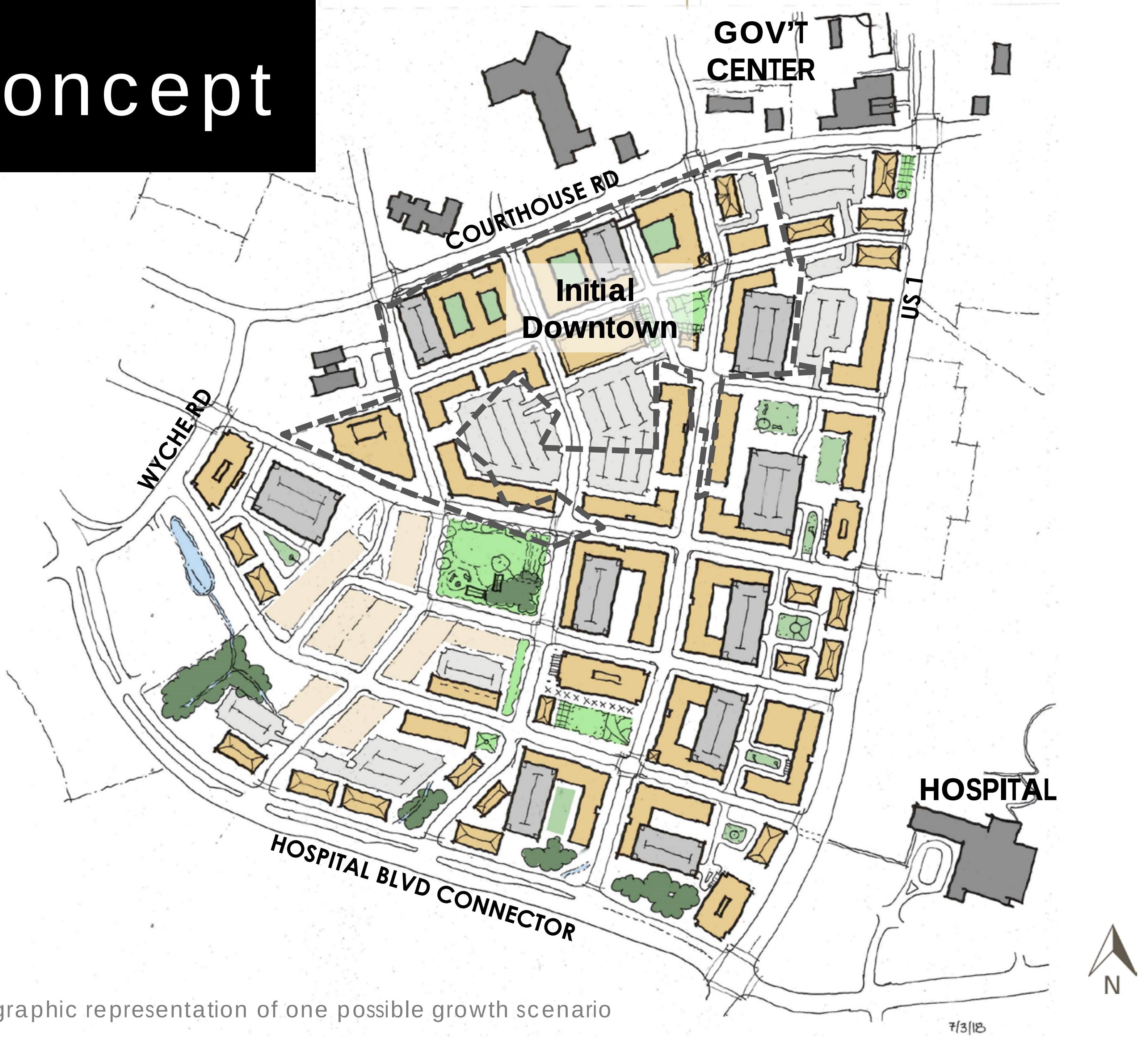
Potential Future Growth Pattern



Future Land Use Concept

20+ year planning horizon

- **Mix of uses**: ground floor retail (incl. grocery), office, multi-family and single-family housing, hotel, civic
- **Walkable, connected streets**
- **Variety of public spaces**

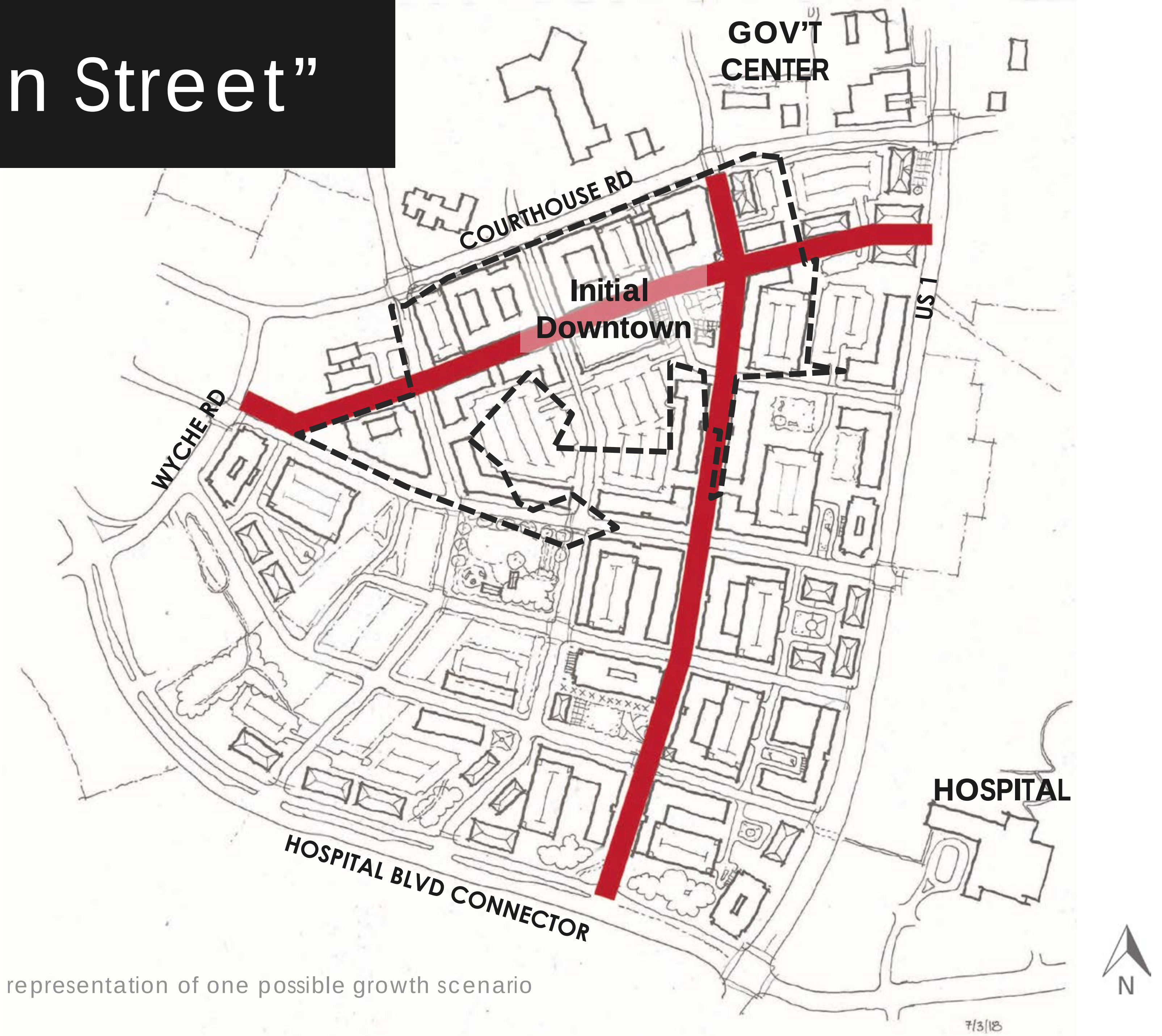


NOTE: This is a graphic representation of one possible growth scenario

Expansion of "Main Street"

A successful initial phase should stimulate organic growth

- Partnerships
- Public Engagement
- Transformative Planning
- Leadership

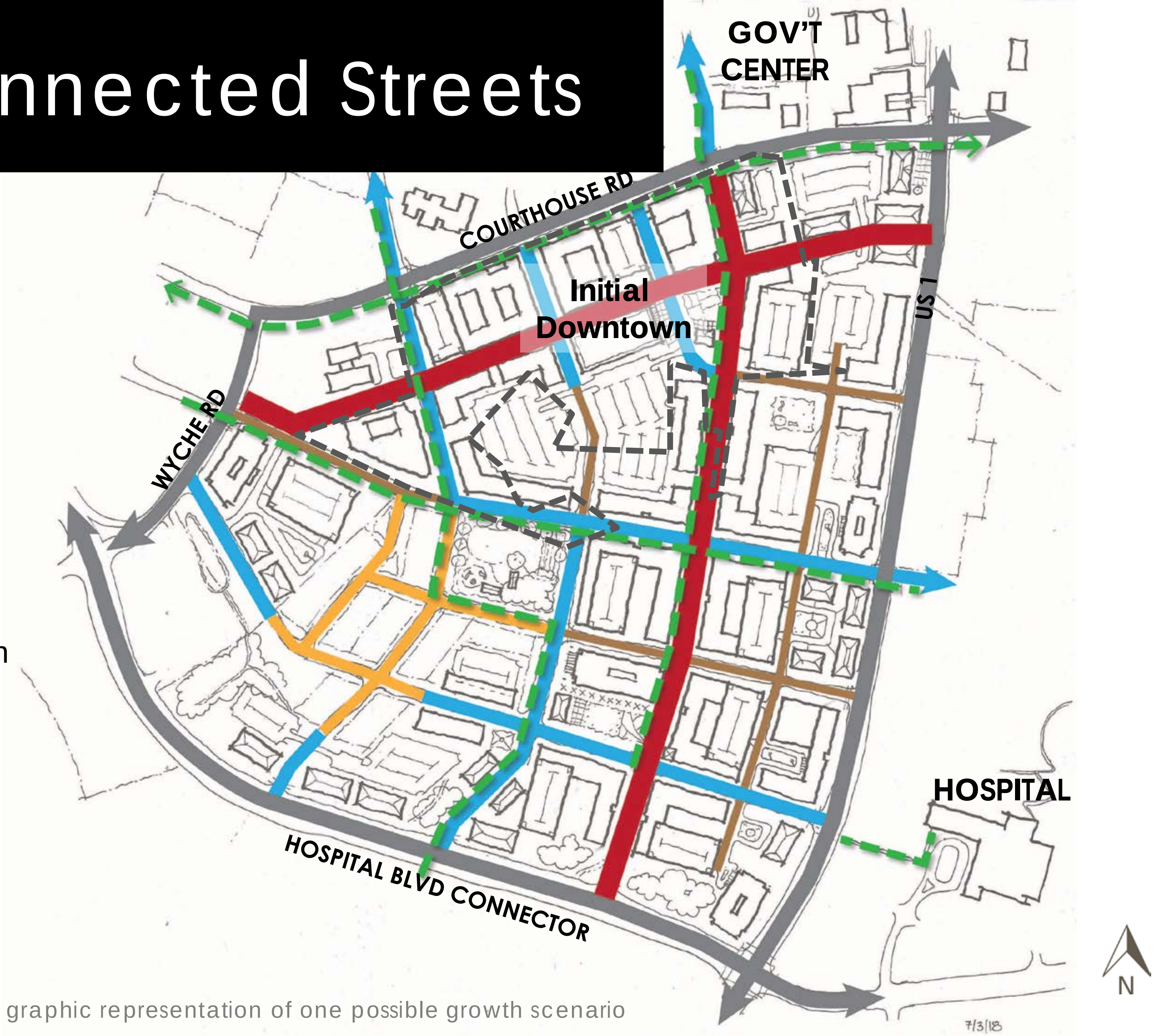


NOTE: This is a graphic representation of one possible growth scenario

Walkable and Connected Streets

Street hierarchy

- **Primary retail street**: most walkable, best streetscape, active edges
- **Secondary streets**: also walkable, mix of ground floor uses, limited parking access points
- **Residential streets**: small-lot single-family or townhouses
- **Service streets**: parking access, etc
- **Multi-use trail**: off-street bike/ped path connecting to neighborhoods

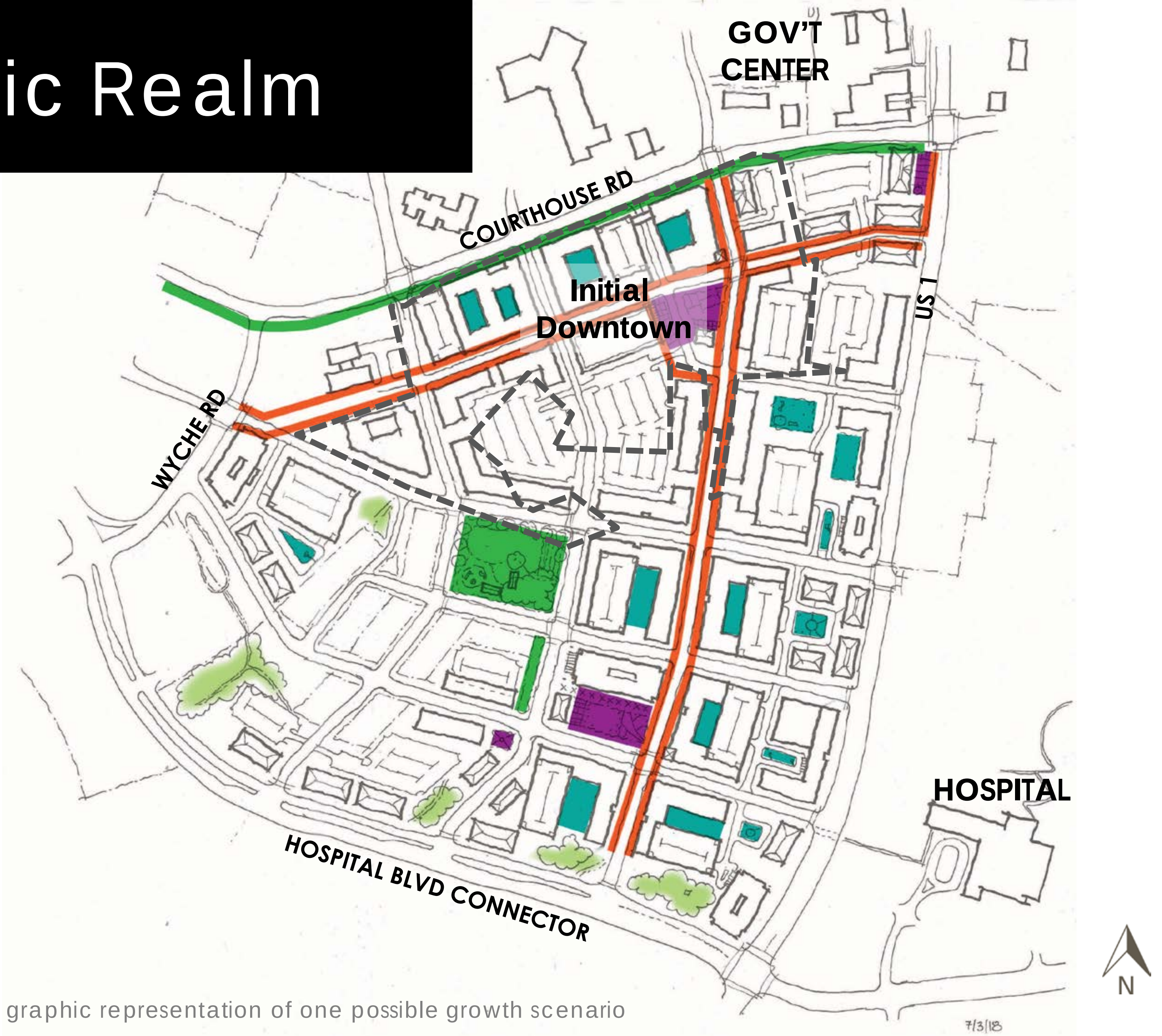


NOTE: This is a graphic representation of one possible growth scenario

Multi-layered Public Realm

Variety of public spaces

- **Town Square**: flexible public spaces with active programming, hardscape, water features, shade structures, etc
- **"Main Street" sidewalks**: wide sidewalks with benches, street trees, café seating, and storefront displays
- **Park**: large public green space with play features, etc
- **Semi-public**: office forecourts and shared residential courtyards



Stantec GREYSTONE

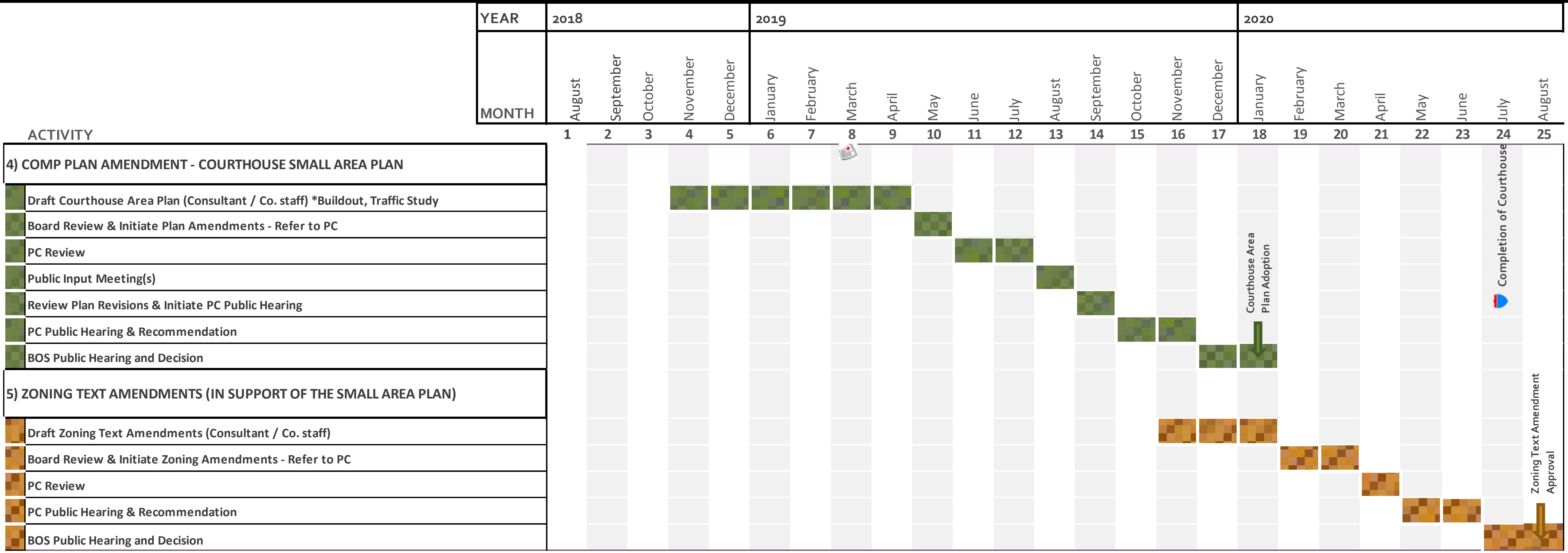
NOTE: This is a graphic representation of one possible growth scenario

Implementation

To achieve the vision of a **walkable, vibrant, authentic** town center that serves as the **heart of the community**, future steps include:

- Modifying the regulatory framework
  - Courthouse Small Area Plan
  - Comprehensive Plan text amendment
  - Broader re-zoning effort
- Targeting greater density development
- Supporting developers/land owners

Future Steps – Planning and Zoning



Implementation – Zoning

To build on the initial phase of Downtown development that occurs on the County-owned parcels a broader re-zoning is recommended. The range of zoning options includes:

- ❑ Re-zoning county-owned parcels only (future development proposals reviewed on case-by-case basis)
- ❑ Acquisition of parcels by county to be included in re-zoning
- ❑ Re-zoning the entire SAP area regardless of ownership
- ❑ Allowing owners to participate in re-zoning

Discussion

Stafford County, Virginia
Real Estate Development Advisory Services

Board Workshop

14 August 2018

Stantec GREYSTONE