PLANNING COMMISSION
CITY OF FREDERICKSBURG, VIRGINIA AGENDA
July 13, 2016
AGENDA
7:30 P.M.
COUNCIL CHAMBERS, CITY HALL

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1. Call To Order
2. Pledge Of Allegiance
3. Adoption Of Minutes

3.I. June 8, 2016 Minutes

Documents:

MINUTES JUNE 8 2016 MEETING DRAFT MARTIN PATES COMMENTS 7 4 16.PDF.PDF

4. Public Hearing Items

4.I. Comp Plan Compliance Review - Fredericksburg City Public Schools

Documents:

COMPREHENSIVE PLAN COMPLIANCE REVIEW - FREDERICKSBURG CITY SCHOOLS - CPCR-01.PDF

4.II. Bed And Breakfast Special Use Permit Request 325 Braehead Drive

Documents:

AIRBNB SPECIAL USE PERMIT.PDF

4.III. City Of Fredericksburg Rezoning (RZ2016-02) GPIN 7870-00-3906

Documents:

RZ2016-02 REZONING - CITY OF FREDERICKSBURG.PDF

5. General Public Comment Period
6. New Business

6.I. Discussion: Economic Development Analysis & Report - Bill Freehling

Documents:

FREDERICKSBURG CRR.PDF
FREDERICKSBURG ED MASTER PLAN FINAL.PDF
FREDERICKSBURG PRESENTATION - MAY 2016.PDF

6.II. Discussion: Small Area Comprehensive Plans Update - Erik Nelson

Documents:

SMALL AREA COMPREHENSIVE PLANS.PDF

7. Other Business

7.I. Planning Commissioner Comment

7.II. Planning Director Comment

8. Adjournment

PLANNING COMMISSION
MINUTES

June 8, 2016
7:30 p.m.
City of Fredericksburg
715 Princess Anne Street
Council Chambers

You may view and listen to the meeting in its entirety by going to the Planning Commission page on the City's website: fredericksburgva.gov

MEMBERS	**CITY STAFF**
Roy McAfee – Chair	Erik Nelson, Deputy Director
Richard Dynes, Vice-Chair	Mike Craig, Zoning Administrator
Jim Pates, Secretary	
Jim Beavers	
Roy Gratz	
Tom O'Toole	
Kenneth Gantt	

1. **CALL TO ORDER**

The June 8, 2016, Planning Commission meeting was called to order by Chairman McAfee. Mr. McAfee explained the standard meeting procedures.

Chairman McAfee welcomed our newest Commission member, Mr. Kenneth Gantt, and thanked him for volunteering to serve the citizens of our great City.

2. **PLEDGE of ALLEGIANCE**

3. **ADOPTION OF MINUTES**

- **May 11, 2016 – Regular Meeting - Adopted**

UNFINISHED BUSINESS/ACTION

4. SE2016-01 - Timbernest, LTD, requests special exceptions for general density and density in the floodplain to redevelop 506 – 512 Sophia Street and a portion of 525 Caroline Street in the Commercial-Downtown (CD) Zoning District.

Mr. Craig presented the revisions made to the application since the public hearing, which was held on May 11, 2016, and he provided a brief slide presentation of the project site and proposal. He said the applicant has clarified that he does not intend to convert the tent and gazebo areas to parking lots, as had been previously planned. He said the applicant said the tent and gazebo are critical to his current business operations, which is why he has chosen not to opt for the infill areas. He has added a pedestrian connection between the project and Caroline Street, and added a vehicular connection – an alley access, Riverwalk Place - extending into the Fredericksburg Square lot. He has changed the materials of the internal sidewalks to stamped concrete, to make it more visible to a vehicular driver that a pedestrian walkway could be in the area. He has added the full Sophia Street streetscape to be in line with [Department of] Public Works planning – full brick sidewalk, rubber mulch, colonial street lights, etc. He has also modified the architecture of the building in response to ARB comments. He said the ARB has not yet seen the revised drawings but Mr. Perroy has made the changes in response to comments made at their meeting. Mr. Craig reviewed the staff analysis that was included in the staff report. He said parking continues to be a concern. He said that the City is aware that this is a debatable project. Therefore, he said that staff recommends approval, with the recommendation that the applicant either:

a. Revise the project, as described in the body of the staff report, to infill the Caroline Street block face and maintain an equivalent parking and service area to what exists today; or

b. Propose a viable alternative to off-set the impact of eliminating 26 on-site spaces currently used by the Fredericksburg Square building.

Mr. Craig also suggested that any recommendation for approval should include, <u>at a minimum,</u> the following proposed conditions:

1. The project shall be developed in substantial accordance with the General Development Plan, entitled "Townhomes at Riverwalk Square," by Commonwealth Architects, dated May 31, 2016 (the "GDP"). The GDP may be modified by the City's Architectural Review Board during the Certificate of Appropriateness process.

2. A direct pedestrian access from Riverwalk Square to Caroline Street, as generally shown on the GDP, shall be constructed by the developer prior to the first issuance of the first occupancy permit for Riverwalk Square.

3. Pedestrian and vehicular access between Riverwalk Square and Fredericksburg Square, along Riverwalk Square, shall be maintained in perpetuity as generally shown on the GDP.

4. The developer shall construct the Sophia Street streetscape, as generally shown on the GDP and in accordance with Public Works comments, prior to the issuance of the first occupancy permit for Riverwalk Square.

5. The developer shall remove the two curb cuts and driveways on either side of the Fredericksburg Square building, restore the streetscape in the area, and re-stripe the parking lane along Caroline Street to maximize the amount of public parking spaces, prior to the issuance of the first occupancy permit for Riverwalk Square.

Mr. Beavers said that Mr. Craig used the [phrase] that this project is "fairly debatable." Frankly, all projects are fairly debatable. He said that in his opinion, what currently exists is not architecturally appealing. He asked Mr. Craig what would be any other downside with this investment other than the parking. And, other than the parking, why would the City not want to see this improved project near the river?

Mr. Craig said staff has tried to identify clearly what the impacts would be in the area and the [Fredericksburg Square} service area is number one. He said the ARB is still not completely sold on the architecture, but he believes that they were generally okay with things too if it could be fit within the context of the overall picture.

Mr. Dynes asked for clarification as to exactly what service impacts there are in terms of things being pushed out into the street or public space, that are not currently there today.

Mr. Craig said mostly parking.

Mr. Dynes asked if the applicant has the option to use the parking deck.

Mr. Craig said there was the potential of a long-term lease when the [downtown] hotel project was being considered. The Marriot won that long-term lease. He said due to bonding, the City is no longer able to sign long-term leases [for the parking deck]. He said staff looked into using the garage and its capacity. He said most of the time there is enough capacity for Mr. Perroy's patrons to use the garage, or book 25 or so spaces for events. He said the exception to that is during holiday months. He said the garage is at peak capacity during holiday months on a regular basis.

Mr. Dynes asked about the proposed "administrative exceptions" [for the project]. He said the internal architecture does not bother him at all as long as it is done well, and maintaining the access to the rear of the commercial space is essential. He said the maintenance issues for the internally-configured houses concern him, and he asked if brick would be used on the rear facing walls so that they would not require maintenance for quite some time, or whether some other material that will require maintenance in a fairly short amount of time will be used. He asked how the increase in density [would] impact the [proposed] One Hanover project next door.

Mr. Craig said he believes One Hanover got a higher density special exception than what is being requested by Mr. Perroy and that the One Hanover property is also within the floodplain.

Dr. Gratz referenced the site plan and asked if Lot One would have any parking at all.

Mr. Craig said Mr. Perroy has not shown any parking but he could potentially provide parking.

Mr. Pates said he did not understand the application. He asked how many special exceptions are actually being requested, and he asked Mr. Craig to explain them.

Mr. Craig said two special exceptions are being requested. One is for "general density."

Mr. Pates asked which one is for general density and for which lots.

Mr. Craig explained that the special exceptions are for a new lot -- Lot 2 -- which is comprised of a portion of an existing lot, which is the Fredericksburg Square lot; and the full 506-512 Sophia Street lot. He said diagram A1 is the old configuration and A2 is the new configuration. He confirmed that the special exception would be strictly for Lot 2.

Mr. Pates asked if they are going from three lots to two lots.

Mr. Craig said no, it is only two lots. He explained the acreage of each parcel/lot.

Mr. Pates asked if the acreage is included in the staff report.

Mr. Craig directed Mr. Pates to the portion of the staff report that reflects the acreage. He noted that there is no density exception for Lot 1.

Mr. Pates and Mr. Craig continued to discuss the special exception requests for clarification.

Mr. Pates asked about the "floodplain density" special exception issues involved with this property. He said that there were approximately four different floodplain categories. He asked what portions of the subject properties fall within which of the different floodplain categories.

Mr. Craig said the properties are only in one floodplain category, which is the 100-year floodplain. He said they are not within the floodway or flood fringe.

Mr. Pates asked Mr. Craig for his opinion on why there is a floodplain overlay district in the Code.

Mr. Craig said he believes it is important to have these types of overlay districts to ensure that there are regulations that are followed. He said he believes there is less density allowed because of environmental reasons or impacts.

Mr. Pates said it was also his understanding that a special exception is supposed to be used for something that is extraordinary or special. He asked what is so different (extraordinary or special) about this property, as opposed to any other property in the floodplain, and why a special exception should be granted in this case.

Mr. Craig said this area is in the core downtown. The City Public Works Department is planning infrastructure for this area and the use of the parking garage and the use of the train. Portions of the Comp Plan also talk about the hard edge on Sophia Street. He said it is a balancing act for the Planning Commission and City Council to weigh the issues and come to a decision.

Mr. Pates said he believes ordinances were written and enacted for a purpose and they should be followed unless there is some compelling reason not to. He asked if Mr. Craig sees any compelling reason to do that now.

Mr. Craig said yes, from a planning perspective. The subject property is in the core area. It is close to transportation facilities and other infrastructure amenities, such as the Riverfront Park, and there are also other plans for that area.

Mr. McAfee said that, for clarification, we are talking about an exception for an increase in density than what is allowed by right and if this project moves forward the density is actually being lowered from what currently exists.

Mr. Craig said that is correct – the density would go from 42 units to 29 units per acre.

Dr. Gratz asked how the footprint of the proposed project would affect the flood level of adjacent properties.

Mr. Craig said that in order to construct buildings within the floodplain, a Base Flood Elevation Study is required, which shows exactly the type of offset to which Dr. Gratz refers. No building is permitted that will raise the flood level anywhere in the City, he said.

Mr. Nelson explained that the displacement of water (with new construction) is actually less than what currently exists even with a larger footprint, due to current building code requirements such as blow out plugs in the walls and other measures. Therefore, he said there is no additional hazard to adjacent properties.

Dr. Gratz referenced the pedestrian sidewalk access. He asked how people will be affected who live in the townhouse development [that will be] accessing Caroline Street. He voiced concern that with this configuration, people would have to walk directly past a party or gathering at the Gazebo/Tent area at Fredericksburg Square, while trying to access Caroline Street.

Mr. Craig said he would allow Mr. Perroy to address this concern. He said staff believes the pedestrian access is a necessary component of the project.

Dr. Gratz said he agrees it is an important component but simply wanted to know how this would affect activities being held at Fredericksburg Square.

Mr. O'Toole noted that the staff report indicates that the Technical Review Committee has reviewed this project and submitted comments. He asked if there were any concerns/comments that should be shared with the Commission.

Mr. Craig said other than what staff has identified as impacts, there were no other engineering or technical impacts that were a concern. He said Mr. Perroy addressed the rear access when he agreed to bring the alley through to the next lot.

Mr. O'Toole asked if the Fire Department has looked at the project and if they are in agreement with having adequate access to the subject property with the back entrance.

Mr. Craig said, yes, they approve and were actually the ones that requested it.

Mr. O'Toole said that during the public hearing on this item, it was said that the project does not require parking because of the building being in the Historic District. He said so essentially the applicant is asking to eliminate the parking that is currently there and to be allowed to construct townhouses in place of the parking.

Mr. Craig said this was correct.

Mr. Dynes said what it comes down to then is you have an existing use of a historic building that has adequate parking today, and we are considering whether to allow the applicant to subdivide the lot that the existing use and building are on, in order to eliminate all the parking that is on site. [This would mean] that: 1) it can be subdivided so it can be joined with another parcel and allow for the construction of townhomes; and 2) for historical architectural reasons we don't want them to actually utilize what remains of the parking that is not in use today but would be available in what they originally proposed. He said so the net deficit here really is all 41 spaces. He said we may recover some from reconfiguring the on-street parking. He asked if this truly meets the spirit of the code that exempts historic buildings from parking requirements.

Mr. Craig said that question came up from Mr. Pates during the public hearing. He said it is a policy that was set by the City Council – reuse of historic buildings is such a priority that we do not have parking requirements. He said that in terms of whether or not it meets the requirements of the UDO, he believes it does. He said, however, that the Comp Plan does state that parking strategies should be evaluated. He said that by choosing to build on that service area in the back, you are losing usable parking spaces, which is a measurable impact. He said it is really a Comp Plan type of issue. He said it could be offset in a couple ways and, as a staff member, he believes there are ways to address this.

Mr. Dynes said, though, that no one has come forward with a credible way or adequate way to mitigate it.

Mr. Craig responded, no sir.

Mr. McAfee asked the applicant if he would like to address the Commission.

Mr. Van Perroy, applicant, thanked City staff for working with them to mitigate and address the issues. He said they have gone back to their architects a number of times and overall, he said, the project has been improved greatly.

Mr. Perroy addressed a question asked earlier by Dr. Gratz as to whether people living in the townhouses will have to walk past a wedding party or other event being hosted at Fredericksburg Square. He said this will not be the case. He said he intends to apply for a wall permit (with ARB approval) that would be constructed to protect that walkway. He reaffirmed changes made that were mentioned during Mr. Craig's presentation of the application.

Mr. Perroy addressed the recommended conditions of approval that were outlined in the staff report. Specifically, Condition #5 states:

> *"The developer shall remove the two curb cuts and driveways on either side of the Fredericksburg Square building, restore the streetscape in the area, and restripe the parking lane along Caroline Street to maximize the amount of public parking spaces prior to the issuance of the first Occupancy Permit in Riverwalk Square."*

He said he cannot accept taking away the curb cuts and that it would create a disaster. He said taking out the curb cuts would prohibit future owners from utilizing driveways and could affect the economic viability of the entire Fredericksburg Square area. He said adding five additional parking spaces as suggested by staff will make no difference for downtown parking and was somewhat irrelevant. Mr. Perroy said [his business] tells its guests that their best bet is to utilize the parking deck and it has always worked out best for them and their guests.

He addressed comments made regarding the service area. He noted that almost all of their deliveries are made from Caroline Street (Sisco, Premium Beverage, Fick, PFG, etc.). He noted that you cannot get a semi-truck into a 12-foot-wide gate, which exists off of Sophia Street. He said if you look at the "service area," there are very few people who access there. He said once in a while, FedEx is able to access that area <u>if</u> the gate is open, but at times it is not open. He said with respect to parking, the ordinance is very clear with respect to historic buildings. He said he is trying to make Fredericksburg Square as viable as possible and he has a City parking deck located right around the corner, that has in excess of 280 spaces; and with the new Spotsylvania VRE station, it is under-utilized. He said there is never a problem with his guests using the deck. He emphasized that the City saying he has to provide parking gets down to a legal issue where, if the City requires him to provide parking, they are essentially saying the UDO is what it is and no one utilizing historic buildings has to provide parking - except for Fredericksburg Square/Timbernest, Ltd. He said he did not write the UDO but he bought the building in 1996 and the UDO parking provision was passed in October 2013 and he believes it was passed for a reason. He said he believes <u>everyone</u> needs to be treated fairly.

Mr. Perroy also addressed pedestrian access to townhomes 5 – 7. He said he does not believe there is going to be heavy pedestrian usage. He said this is a neighborhood where they currently have 13 people who all know each other, and they are going up to 14 with the new proposal. He said there won't be a reason for most people to be in the area unless they are visiting someone.

Mr. Beavers asked Mr. Perroy if the removal of the curb cuts is his biggest objection to what staff has suggested as conditions.

Mr. Perroy said there are a couple of conditions he has a problem with, but, yes, the curb cuts is the biggest concern.

Mr. Pates said he wanted to go back to the question raised earlier about the present configuration of the property. He asked if Mr. Perroy has two or three "lots of record."

Mr. Perroy said there are only two lots – the Fredericksburg Square lot fronts on Caroline Street and the rear fronts on Sophia Street. The 506-516 Sophia Street property is a rectangular lot, as Mr. Craig described it.

Mr. Dynes asked how many guests typically attend weddings at Fredericksburg Square.

Mr. Perroy said approximately 100 – 125. He said it used to be 150 but people are more conservative now with the unstable economy.

Mr. Gantt referenced parking. He said that with the opening of the VRE Lot in Spotsylvania, he is aware that parking at the City parking deck is available. He noted, however, that the events that are held at Fredericksburg Square are typically on weekends and holidays, days which the City also has a larger influx of visitors to the downtown. He asked if Mr. Perroy looked at those numbers or only times when activities and other events are down in numbers.

Mr. Perroy said he spoke with the people who work at the parking deck and was told that during the week, parking is certainly down in numbers. The only times there have been issues has been on weekends, when the deck fills up with activities such as Oktoberfest.

Mr. Craig said that staff contacted the parking deck staff as well. He said between June 2015 and January 2016, on weekdays, there was consistently a weekday peak that hit the capacity at the deck. Since then, he said, the Feb – April 2016

numbers have trended down by about 20 spaces but still hits capacity on weekends. He said there is a weekend peak that does coincide with the Holiday season.

There were no further questions for the applicant or staff.

Mr. McAfee asked the will of the Commission.

Mr. Dynes said he thought the recommendations requested by staff would need to be significantly altered. He said the parking issue for him has been addressed and satisfied. He said he would be in favor of the project. He noted specifically that the following items would need to be removed from the recommendations and/or conditions for him to recommend that the application move forward [reading from staff report]:

Recommend approval on the condition that the Applicant either:

a. *Revises the project as described in the body of this report to infill the Caroline Street block face and maintain an equivalent parking and service area to what exists today; or*
b. *Proposes a viable alternative to off-set the impact of eliminating 26 on-site spaces currently used by the Fredericksburg Square building.*

Any recommendation for approval should include at a minimum the following proposed conditions:

5. *The developer shall remove the two curb cuts and driveways on either side of the Fredericksburg Square building, restore the streetscape in the area, and restripe the parking lane along Caroline Street to maximize the amount of public parking spaces prior to the issuance of the first Occupancy Permit in Riverwalk Square.*

Mr. McAfee asked if there is a motion to be offered by Commissioners.

Mr. Beavers made a motion to recommend approval of the two special exception requests and removing Condition #5 regarding curb cuts.

Mr. Gantt asked for clarification of the motion.

Mr. McAfee confirmed with Mr. Beavers that his motion was to recommend approval of the two special exception requests and to include conditions 1 – 4 outlined in the staff report.

Mr. Dynes asked what happens with Recommendations a. and b., which were also suggested in the staff report.

Mr. McAfee said those are options that are not being discussed.

Mr. Beavers said but they are options.

Mr. McAfee asked Mr. Beavers if they were then part of his motion.

Mr. Beavers said yes.

Mr. McAfee said that was not made clear when Mr. Beavers made his motion. He asked Mr. Beavers to restate his motion.

Mr. Dynes said he would like to make an amendment to the motion made by Mr. Beavers.

Mr. McAfee said Mr. Dynes would need to second the motion first as it has not been seconded.

Mr. Beavers withdrew his motion to allow Mr. Dynes to make the motion.

Mr. Dynes made a motion to recommend approval of the two special exceptions, with the following alterations to the conditions recommended by staff: **Remove condition "a."** [reading from staff report]:

> a. *Revises the project as described in the body of this report to infill the Caroline Street block face and maintain an equivalent parking and service area to what exists today;*

Remove condition "5":

> 6. *"The developer shall remove the two curb cuts and driveways on either side of the Fredericksburg Square building, restore the streetscape in the area, and restripe the parking lane along Caroline Street to maximize the amount of public parking spaces prior to the issuance of the first Occupancy Permit in Riverwalk Square.;*

A**nd to add a new 5th condition** which reads**:**

"5. Construction of a new wall, which is to be approved by the ARB, and to be installed along the new pedestrian sidewalk/walkway from Caroline Street along the Southern Drive to Lot 2.

Mr. Beavers seconded the motion.

Mr. McAfee asked if there was any further discussion of the motion.

Mr. Pates said the motion before them is to recommend approval, provided the applicant proposes a viable alternative to offset the impact of eliminating 26 on-site spaces currently used by the Fredericksburg Square building. He said he does not understand how the Planning Commission can recommend approval of something when it does not know what it is. He said this is like saying, "We recommend approval of your application

if you revise your application." He asked what this gets the City and how it can possibly help the City Council. He said he would much rather see the Commission delay action on this application until the next meeting and have the applicant come back with a viable alternative that the Commission can vote on. He said he believes this constitutes the Planning Commission not doing its job.

Mr. Gantt said he is the new member, but he has read the Minutes from the public hearing on this matter and it appears that the Planning Commission continues to "kick the can" on this application. He said he understands the concerns of Mr. Pates but at the same time he would imagine that if there is something that is not provided to the ARB or City staff that takes this into consideration for City Council, then the City Council can still come back and say they do not agree with the proposal at this point. He confirmed that the Commission is only making a recommendation to City Council.

Mr. McAfee said Mr. Gantt is correct and that the Commission is an advisory body.

Mr. Gantt said he would agree with Mr. Pates that there is probably more that can be done with respect to continuing to ask Mr. Perroy to come back regarding parking issues. However, at the same token, the Commission is advising that this application move forward and that a viable solution comes forward from Mr. Perroy, through the ARB, on what can be done with respect to parking. He said the question becomes, does the Commission decide what viable is, or does the City Council need to say that it agrees with the Parking Ordinance that it passed. He said he believes the Commission has met the letter or the intent because the City wants something that addresses parking.

Dr. Gratz asked if the motion made by Mr. Dynes is [recommending approval of] both special exception requests.

Mr. McAfee said normally there would be a Resolution, which would clarify the two requests but that the City Attorney has not able to get that to the Commission. He said he had called the City Attorney a couple days ago and has not heard back from her.

Mr. Craig said the Planning Commission is voting on a motion and that for these types of applications, the City Council [members] are the ones who vote on Resolutions or Ordinances. He said he believes the Commission has made a coherent motion, which is to recommend approval of both special exceptions. He said since it is a recommendation and it has the clear language of the motion, it is consistent and adequate. However, he said the Council will take two votes.

Mr. McAfee asked Mr. Dynes and Mr. Beavers if it was their intent to include both special exception requests in the motion and the second, respectively.

Mr. McAfee and Mr. Dynes confirmed it was their intent.

Mr. McAfee called for the vote.

Motion carried by a vote of 5 – 2, with Mr. Pates and Dr. Gratz voting against the motion.

GENERAL PUBLIC COMMENT

6. *A general public comment period is provided at each regular meeting for comments by citizens regarding any matter* ***related to Commission business that is not listed on the Agenda for Public Hearing****. The Chair will request that speakers observe the* ***three-minute time limit*** *and yield the floor when the Clerk indicates that their time has expired. No dialogue between speakers will be permitted.*

Mr. McAfee opened the floor for general public comment.

There were no speakers.

Mr. McAfee closed the General Public Comment period.

OTHER BUSINESS

7. Planning Commissioner Comment

Mr. Dynes said he was not present at the May 11, 2016 meeting but that he had read Mr. Pates' comments from the last meeting regarding the Planning Commission not being engaged in the planning processes of the City. He said he would like to see it happen. He said he is also concerned and disappointed that the Planning Commission was not involved with the hiring process for the consultant for the Comprehensive Plan Area Plans.

Mr. McAfee clarified that he (as Chairman) has been the representative for the Planning Commission during the entire process of the selection of a consultant for the Area Plans process, and therefore had input.

Mr. Beavers said he would also like to point out to Mr. Pates that his comments said that the Commission did not meet for its second meeting of the month in November or December. Mr. Beavers clarified that there is only one meeting scheduled for the months of November and December, both of which were held. He noted that due to the holidays, there is no second meeting scheduled for those two months. And, regarding the proffers [policy], he said, six months ago he would have agreed but now given what the General Assembly has done, he asked Mr. Pates (as an Attorney) if the City should really go down that path.

Mr. Pates responded, "Absolutely, no question!"

Mr. Beavers asked if there is no risk to the City by doing so.

Mr. Pates said no.

Mr. Beavers said finally, he would like to address the last comment made by Mr. Pates, which said: *"Fifth, and perhaps most importantly, by doing little or no planning, this Commission is abdicating its responsibilities to assist the City Council in planning the future of the City and turning that function over to City staff. How can the City Council do its job when the Commission is not doing its own?"* He said City staff are paid professionals and that is why they are here. He said the rest of us are lay people who have a great interest in our City, but this is why the City hires professional planning staff. He said he has a Master's Degree in Public Administration with a focus on Urban Planning, but he can say with confidence that he

does not know what the Deputy Director, the Director, or the Zoning Administrator does because it has been close to 40 years.

Mr. Gantt said he is happy to be appointed to the Planning Commission and he looks forward to serving the City. However, he said, he was a bit concerned when he read the comments made by Mr. Pates at the May 11, 2016 meeting because we have a member who has some concerns regarding the activities of the Commission. He said he would be interested in the actuality of the work the Commission does and how they do it in conjunction with the City staff. He said he agrees with Mr. Beavers comments and does not have a degree in public administration. But he said, what he does have is a love for the City, common sense, and the ability to listen to the experts who provide the information to help us as a Commission to advise City Council. He said but if there is a concern that something is not happening with the Commission, then we need, as a group, to take a look at that.

Mr. Pates asked if there is a meeting scheduled for June 29th.

Mr. Craig said there is no business to move forward for the 29th of June so the next scheduled meeting is July 13th.

Mr. Pates said this was exactly what he was talking about [at the last meeting]. He said unless there is some developer here with a project to be reviewed, the Commission does not meet. He said there is a tremendous amount of work to be done and it seems to him that we need to take advantage of our next meeting time to do a little actual planning. He said there are many topics. He said it would be nice to have a discussion with the Economic Development Department to discuss a recently-released study that he believes is relevant to the Planning Commission's responsibilities.

Mr. McAfee said he believes some of what Mr. Pates is saying is a bit of a misrepresentation and he takes issue with it. He said the Commission goes through a lot of effort when it creates and/or revises the City's planning documents and that there is a time for everything. He told Mr. Pates he is sorry if he missed that curve and did not get enough work in with those processes, but he is confident that if Mr. Pates continues to serve on the Commission, he will have ample opportunity to bite into some of it in the future. He noted that the Area Plan process will be kicking in which will also provide for quite a bit of Commissioner input.

Mr. Gantt referenced the Planning Commission By-Laws, which under Article 5, states that if there are no actions or other applications to move forward there will be no meeting.

Mr. Dynes said work sessions have been scheduled in the past. He said that in reference to the comment made by Mr. Pates to meet with the Economic Development Department, he would not want it to be a multi-hour event, but he certainly thinks it is worth an hour or an hour-and-a-half of his time and believes it would be very useful for the Commission and the City.

Mr. Craig said that once Mr. Johnston returns from his trip, he will discuss the best route to take with Mr. Freehling to meet with the Economic Development Authority.

Planning Director Comment

None.

ADJOURNMENT

Meeting adjourned.

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Roy McAfee, Chair

MEMORANDUM

TO: Chairman McAfee and Planning Commission Members
FROM: Marne E. Sherman, Development Administrator
RE: Comprehensive Plan Compliance Review for Proposed School Bus Facility at 1100 Belman Road, GPIN 7778-99-5990
DATE: June 21, 2016 (for the **July 13, 2016 meeting**)

ISSUE

Fredericksburg City Public Schools (FCPS) requests a Comprehensive Plan Compliance Review to determine if a school bus facility is substantially in accord with the 2015 Comprehensive Plan per the Code of Virginia, Section 15.2-2232. The facility is proposed to be located at 1100 Belman Road (GPIN 7778-99-5990) within the Battlefield Industrial Park and is zoned I-2, General Industrial.

RECOMMENDATION

Approval of the attached resolution finding the proposed school bus facility at 1100 Belman Road to be substantially in accord with the City's 2015 Comprehensive Plan.

BACKGROUND

Under the Code of Virginia §15.2-2232 and City Code §72-22.2, no new public facility may be constructed unless and until the general location or approximate location, character and extent thereof has been submitted to and approved by the Planning Commission as being substantially in accord with the adopted Comprehensive Plan or part thereof.

Following a public request for proposals, FCPS selected 1100 Belman Road (GPIN 7778-99-5990) to lease dedicated space for a school bus facility. The approximately five acre property, located within the Battlefield Industrial Park, would be developed by the owner, L&L Real Estate. The project generally includes bus parking spaces, employee and visitor parking spaces, offices, and space for potential expansion and future maintenance facilities.

The site is zoned I-2, General Industrial, and is located on the south side of the Blue Gray Parkway with access to the west side of Belman Road and the north side of Tyler Street. The site is directly across Tyler Street from the existing City Shop which is located at 1000 Tyler Street. The close proximity permits the bus maintenance and fueling aspects of the school bus operation to remain at the City Shop while freeing up considerable square footage for use by the Public Works Department which has expanded to meet the need of the City's increased population.

COMPREHENSIVE PLAN COMPLIANCE REVIEW ANALYSIS

The City of Fredericksburg's 2015 Comprehensive Plan addresses goals, policies, opportunities, and initiatives for public facilities, transportation, and Land Use Area 9: Braehead/National Park.

Public Services, Public Facilities, and Preserved Open Space, Chapter 4, pages 57-59:

Goal 1: Efficient and Effective Public Services
"Provide the City's public services in an efficient and effective manner to all City residents."

Policy 3: "Work with the Fredericksburg Public Schools to develop a plan for a cost-effective expansion of selected schools, to address the projected student population."

Initiative 4: "Develop a plan to address the need for additional classrooms within the City's school system, by:
a. Providing capital improvement funding to meet school facility needs, and by
b. Providing operational funding for appropriate student/teacher ratios."

The 2015 Comprehensive Plan and adopted FY2016 City budget indirectly address the need for a new school bus facility in their recognition of a growing school population for which school bus parking and maintenance must be expanded to provide efficient and effective transportation services. Space to accommodate a growing fleet of school vehicles is not available at the City Shop.

According to the January 2015 K&C Associates report which is referenced in the FY2016 Adopted Operating and Capital Budget, the school system experienced enrollment growth of 12.1 percent over the past five years from FY 2011 and FY 2016. The Public School Enrollment Trends section of the 2015 Comprehensive Plan (Chapter 4, page 65) notes that 3,306 students were enrolled in City public schools as of September 2014 and that "continued growth is anticipated." FCPS reports current enrollment at 3,525 students. The Weldon-Cooper Center projected a school enrollment population of 4,000 students by 2020 and FCPS anticipates additional growth to 4,300 students by 2024.

The relocation of the school bus facility will create additional space at the City Shop to accommodate the expanded inventory of Public Works equipment and employees. In turn, Public Works will be able to continue providing efficient public services to all City residents and businesses.

Transportation, Chapter 3, page 41:

Goal 2: Alternative Modes of Travel
"Encourage the use of alternative modes of travel (transit, rail, and trails), to enhance mobility and accessibility to minimize automobile congestion."

Goal 6: Transportation Efficiency
"Reduce congestion on existing streets. Minimize potential street congestion resulting from new development."

School bus transportation provides an efficient means for travel to and from school. It reduces individual automobile trips by students and parents. However, as the school population increases, the fleet must be expanded to maintain acceptable levels of travel time and encourage continued use of

the system. The increase in the number of school buses must be accommodated and there is no additional space at the existing City Shop.

The close proximity of the proposed site to the Blue Gray Parkway allows for direct access from a major road system to neighborhoods throughout the City. The equally close proximity of the proposed location to the City Shop will allow for maintenance and refueling with minimal impact to the public street network.

Land Use Planning Area 9: Braehead/National Park, Chapter 11, page 168:

Opportunities

- Provide for appropriate commercial development along the Blue Gray Parkway.
- Continue to develop the City/Battlefield Industrial Park.
- Respect the battlefield lines of sight.

The site is currently under-developed with temporary surfacing improvements and no buildings. The proposal to add infrastructure and the school bus facility will realize a noted opportunity for continued development of the Battlefield Industrial Park. The development of this portion of the approximately five acre site will also provide the needed capital for construction of additional commercial use along the Blue Gray Parkway. Further, the development of this site will be screened along the Blue Gray Parkway with approximately 60 feet of existing vegetative buffer within the right-of-way and additional landscaping onsite. This site will be out of view of the battlefield and National Park lines of sight.

FISCAL IMPACT

Costs associated with the annual renewal of the lease would be considered with the City Council's review of the budget. The annual obligation for the leased space would start at approximately $100,000. Since the site to be developed is privately owned, annual tax revenue generated from the property would increase to offset a portion of the costs.

Attachments:
Draft Resolution
Cover letter, dated January 11, 2016
Aerial Photo from FredGIS
Public Works Memo, dated February 2, 2016

cc: Doug Fawcett, Director of Public Works

MOTION:

SECOND:

July 13, 2016
Planning Commission
Resolution No. 16-__

RE: **APPROVAL OF THE PROPOSED SCHOOL BUS FACILITY AT 1100 BELMAN ROAD AS SUBSTANTIALLY IN ACCORD WITH THE 2015 COMPREHENSIVE PLAN**

ACTION: **APPROVED; Ayes: 0; Nays: 0**

The Fredericksburg City Schools plan to lease a portion of 1100 Belman Road, for the development of a school bus parking and maintenance facility. The property is in the Battlefield Industrial Park, and is located in Planning Area 9.

Under Code of Virginia §15.2-2232 and City Code §72-22.2, no new public facility may be constructed unless and until the general location or approximate location, character and extent thereof has been submitted to and approved by the Planning Commission as being substantially in accord with the adopted Comprehensive Plan or part thereof.

The proposed establishment of the school bus parking and maintenance facility is consistent with the public facilities, transportation, and Planning Area 9 chapters of the 2015 Comprehensive Plan, as stated more fully in the staff report.

The Fredericksburg Planning Commission therefore resolves the proposed school bus parking and maintenance facility at 1100 Belman Road is substantially in accord with the 2015 Comprehensive Plan.

Votes:
Ayes:
Nays:
Absent from Vote:
Absent from Meeting:

Fredericksburg Public Schools
817 Princess Anne Street
Fredericksburg, Virginia 22401-5819
Telephone: (540) 372-1130
Fax: (540) 372-1111

January 11, 2016

To: City of Fredericksburg Department of Planning and Community Development

From: Dr. John B. Gordon III-Director of Administrative Services

Re: Application for New Bus Lot for Fredericksburg City Public Schools

As part of the City of Fredericksburg's comprehensive plan for 2015, one of the goals detailed the importance of public services and facilities that promote the highest quality community. With Fredericksburg being one of the fastest growing communities in the Commonwealth of Virginia, it is important that Fredericksburg City Public Schools is able to accommodate this growth.

For decades, the Fredericksburg City Public Schools transportation department has shared the City Shop located at 1000 Tyler Street to house all school buses and school vehicles. Due to the growth of our school division, the need to purchase additional school buses has created a lack of maneuverability and parking space for FCPS transportation vehicles. During this same timeframe the City of Fredericksburg, has also purchased additional heavy equipment to include dump-trucks, tractors, and other equipment needed by the City of Fredericksburg's Public Works department and transportation department. These additional vehicles have created driving and parking situations that are no longer safe on site. There have been several near misses and a few incidents of city vehicles both from FCPS and the City of Fredericksburg that have actually caused damage to the City Shop building.

Serving approximately 3,300 students, one of the chief goals of Fredericksburg City Public Schools is to be able to safely transport our students to and from school, extra-curricular activities, and to be able to provide our transportation staff with a safe and workable environment. Part of the City of Fredericksburg Comprehensive Plan states that transportation is one of the key concepts that will drive the city and determines how the city will grow. The Comprehensive Plan details the need for road improvements such as widening the road in the Bragg Hill area, but does not specify the need for improving the parking and space concerns that currently exist at the city shop. Fredericksburg City Public Schools is hoping that a new bus lot that meets all of the city requirements for paving, parking, and having a meeting space, will provide both the City of Fredericksburg and Fredericksburg City Public Schools the space needed to allow for future growth and to prevent future accidents or incidents.

Fredericksburg City Public School Bus Facility

MEMORANDUM

TO: Marne E. Sherman
Development Administrator and Code Enforcement Officer
FROM: Doug Fawcett, Director of Public Works
DATE: February 2, 2016
SUBJECT: Proposed Relocation of City Schools Transportation Operation

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The City Schools student transportation operation (school bus parking and maintenance, general management, fueling and employee vehicle parking) has been co-located with the Public Works Department City Shop operation at 1000 Tyler Street since the early 1980's.

As the City has grown in the past 30+ years, so have the number of school busses (and the number of employees necessary to operate them.) The Public Works operation has also grown. The situation has reached the point that neither operation has had sufficient space to efficiently operate for several years.

Thus, for at least the past five years, efforts have been underway to find an alternate location for the City Schools transportation operation, so that both operations may again have adequate room for storage of vehicles and equipment, employee parking, etc.

The proposed re-location of the bus parking, employee parking and general management of the City Schools student transportation operation to 1100 Belman Road provides a solution to the space dilemma for both City Schools and Public Works. The close proximity of 1100 Belman Road to the City Shop permits the bus maintenance and fueling aspects of the City Schools operation to remain at their current location while freeing up considerable square footage for use by the Public Works Department.

For this reason, the Public Works Department wholeheartedly supports the proposal to move the bus parking, employee parking and general management operations of the City Schools transportation division to 1100 Belman Road.

Please let me know if you need anything more from me on this matter.

MEMORANDUM

TO: Chairman Roy E. McAfee and Planning Commission Members
FROM: Mike Craig, Zoning Administrator
DATE: July 1, 2016 for the July 13 meeting
RE: SUP-2016-02, Catherine Dodd (homeowner) requests a Special Use Permit for a Bed and Breakfast at 325 Braehead Drive (GPIN 7778-75-8585), in the R4 Residential Zoning District.

ISSUE

Should the Planning Commission recommend approval of a Special Use Permit for a Bed and Breakfast at 325 Braehead Drive?

RECOMMENDATION

Recommend to the City Council approval of the Special Use Permit, subject to following conditions:

1. The bed and breakfast inn shall be operated in substantial conformance with the special use permit application dated June 3, 2016.
2. The use shall commence within 24 months of the date of this resolution.
3. The use shall commence within 24 months of the date of this resolution.

BACKGROUND

325 Braehead Drive is a single family home in the Braehead Woods subdivision, a large lot single family neighborhood. The lot size of 325 Braehead, at 0.42 acres (18,432 square feet), is typical of the lot size in this neighborhood. The property is zoned R4 Residential. The parcel is bordered by lots containing single family homes to the west, to the east, and to the south. The parcel is bordered by the Fredericksburg Battlefield to the north. The single family home is one-story, brick, and has a front porch, a rear deck, and a finished basement. The total interior area is 1,392 square feet. The asphalt driveway can accommodate two or more motor vehicles. In addition, the lot has 100 feet of frontage on Braehead Drive, 70 feet of which is available for on-street parking.

Catherine Dodd owns 325 Braehead Drive and wants to advertise her property on Airbnb as a one bedroom bed and breakfast. She proposes to make the finished basement, with a private entrance, bedroom, bathroom and living area, available to Airbnb renters. She does not propose to permit special events or receptions, family gatherings or parties, etc. Quiet hours will be from 10:00 p.m. to 7:00 a.m. Ms. Dodd anticipates that she will have renters about twice per month.

SPECIAL USE PERMIT ANALYSIS

Special use permits are evaluated according to the criteria contained in the UDO, Section 72-22.6, as follows:

(1) The proposed special use at a specified location shall be:

(a) In harmony with the adopted Comprehensive Plan;

The future land use map calls for this area to be low density residential. The property is within Land Use Planning Area 10. The one relevant opportunity listed on page 172 of the Comprehensive Plan is to "protect existing residential neighborhoods from existing and proposed commercial development, through transitional uses and design standards to minimize adverse impacts."

(b) In harmony with the purpose and intent of the zoning district regulations;

The purpose of the R4 zoning district is "*to provide for single-family detached dwellings in both developed and undeveloped areas of the City at densities up to four units per acre. The district also allows selected uses which are compatible with the medium density residential character of the district…*" A Bed and Breakfast is a selected use compatible with the medium density.

§ 72-41.3F contains principal use standards for the operation of a Bed and Breakfast:

(1) Operated in a principal building and not in any accessory building or structure.
The use will be within the existing house.

(2) The front yard of an inn shall not be used for parking. If parking cannot be provided on the site, it must be provided within 500 feet of the site.
The site has an existing driveway that can accommodate two cars and adjacent on-street parking that can accommodate three cars.

(3) A maximum of five guest rooms shall be allowed, with not more than 10 occupants.
The facility is proposed to contain one bedroom.

(4) The facility shall be managed by an individual who resides on the premises.
Ms. Dodd is the homeowner and lives on-site.

(5) For identification of the bed-and-breakfast inn, one wall sign of four square feet is permitted. Such sign shall not be directly illuminated, nor shall it contain the word "hotel" or "motel." Such sign shall meet all zoning requirements.
No signs are proposed.

(6) There shall be no more than one kitchen.
There is only one kitchen in the house and no interior renovations are proposed.

(7) Receptions and other such functions, for compensation, shall require approval of a special use permit.
No receptions or other functions are planned at this point.

(c) In harmony with the existing uses or planned uses of neighboring properties.

325 Braehead Drive is within a single family neighborhood. The house is adjacent to other single family homes and the national battlefield.

In considering an application for a Special Use Permit, the Planning Commission and City Council shall consider potential adverse impacts including:

1. **Traffic or parking congestion;**

Braehead Woods is a large lot (for the City) single family neighborhood. Adding a Bed and Breakfast will increase traffic on Braehead Drive when the Bed and Breakfast has guests.

There is an existing driveway on-site at 325 Braehead Drive capable of accommodating two cars and three on-street parking spaces adjacent to the parcel. The Applicant has proposed limiting the use to one bedroom. Per § 72-53.1C(2), a one bedroom Bed and Breakfast requires 3 parking spaces.

2. **Noise, lights, dust, odor, fumes, vibration, and other factors which adversely affect the natural environment;**
   The Bed and Breakfast use, by adding more people on-site, could create additional light and noise then the current single family use. The Applicant has proposed quiet hours for the Bed and Breakfast between 10 pm and 7 am.

3. **Discouragement of economic development activities that may provide desirable employment or enlarge the tax base;**
   The use constitutes economic development.

4. **Undue density of population or intensity of use in relation to the community facilities existing or available;**
   There are sufficient public utilities to serve the site.

5. **Reduction in the availability of affordable housing in the neighborhood;**
   Not applicable, this Special Use application is for a use in an existing building.

6. **Impact on school population and facilities;**
   Not applicable, this Special Use application is commercial in nature.

7. **Destruction of or encroachment upon conservation or historic districts;**
   Not applicable, this Special Use application is not within the City's historic district.

8. **Conformity with federal, state and local laws, as demonstrated and certified by the applicant; and**
   The applicant has, to our knowledge, conformed to all federal, state, and local laws.

9. **Massing and scale of the project.**
   There are no exterior alterations proposed with this project.

CONCLUSION:

The proposed Bed and Breakfast is within a single family neighborhood. Adding a Bed and Breakfast into the neighborhood could generate some additional traffic and parking demand. Also, adding people into the home could cause light and noise.

The recommended conditions will offset these impacts by limiting the Bed and Breakfast to a single bedroom in the basement.

With this condition, the application meets the criteria noted above.

ATTACHMENTS:

1. Application and Supporting Materials
2. GIS Map

Application #SUP: _____
Date: _____
Fee/Check#: _____

APPLICATION
SPECIAL USE PERMIT

APPLICANT NAME: Catherine F. Dodd

MAILING ADDRESS: 325 Braehead Dr. Fredericksburg, Va. 22401

TELEPHONE: 540-222-3658 E-MAIL: foever L8@yahoo.com

THE UNDERSIGNED HEREBY APPLIES FOR A SPECIAL USE FOR: _____

A Bed and Breakfast in the R4 zoning District

THE SUBJECT PROPERTY IS DESCRIBED AS FOLLOWS:

Property Location 325 Braehead Dr.

Property Owned By Catherine F. Dodd

Owner's Mailing Address 325 Braehead Dr. Fred., Va. 22401

Proposed Use of Property (*be specific*) Bed and Breakfast

HOURS OF OPERATION 2 NUMBER OF EMPLOYEES owner

Anticipated Number of Patrons or Clients 2/month

Description of the development's impact on neighboring and adjacent properties (please submit a complete and accurate description on a separate sheet of paper):

1. Compliance with Comprehensive Plan:
2. In harmony with the purpose and intent of the zoning district regulations:
3. In harmony with the existing uses or planned use of the neighboring properties:
4. Traffic Impact:

Special Use Permit Request
(Application Continued)

I do hereby make oath or affirmation that to the best of my knowledge, the foregoing information contained in this application is true.

Catherine F. Dodd — June 3, 2016
Signature of Applicant — **Date**

PRINT NAME OF APPLICANT Catherine F. Dodd

The above oath or affirmation was signed before me and witnessed by me this 3 **day of** June, 2016 **in the County / City of** Fredericksburg **in the state of Virginia.**

Notary Signature _____

Notary Registration # 7615786 **Commission Expires** 10/31/2018

Catherine F. Dodd — June 3, 2016
Signature of Owner — **Date**

PRINT NAME OF OWNER Catherine F. Dodd

The above oath or affirmation was signed before me and witnessed by me this 3 **day of** June, 2016 **in the County / City of** Fredericksburg **in the state of Virginia.**

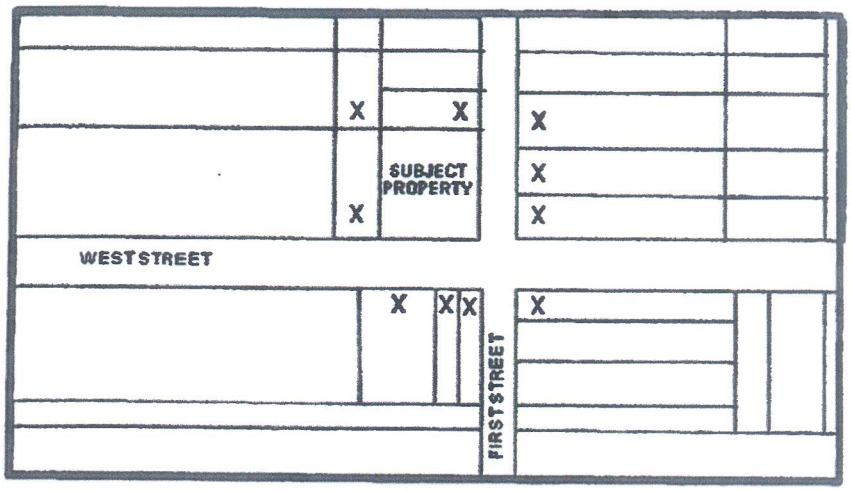
Notary Signature _____

Notary Registration # 7615786 **Commission expires** 10/31/2018

PHAUN MARIE MOORE
NOTARY PUBLIC
REG. #7615786
MY COMMISSION EXPIRES
10/31/2018
COMMONWEALTH OF VIRGINIA

EXAMPLE DIAGRAM OF ADJOINING PROPERTY OWNERS

X = Property owners to be notified



PROPERTY OWNERS LIST

325 Braehead Dr. — **SUBJECT ADDRESS**

7778-75-8585 — **GPIN #**

Adjoining property owner names and addresses can be obtained by visiting the City website at www.fredericksburgva.gov and following the link to GIS, or by visiting the Office of Real Estate at City Hall, 715 Princess Anne Street, Room 107.

Adjoining Property Owner's Name and Mailing Address

Property Address	323 Braehead Dr.	7778-75-7674
Owner Name	Eric + Veronica Deschambault	**GPIN NUMBER**
Mailing Address	323 Braehead. Dr.	
City, State, Zip	Fredericksburg, Va. 22401	

Property Address	327 Braehead Dr.	7778-75-9477
Owner Name	Carroll Alex Smith	**GPIN NUMBER**
Mailing Address	327 Braehead Dr.	
City, State, Zip	Fredericksburg, Va. 22401	

Property Address	324 Braehead Dr.	7778-75-7335
Owner Name	Kenneth Thorstead + Mudd-Thorstead	**GPIN NUMBER**
Mailing Address	324 Braehead Dr.	
City, State, Zip	Fredericksburg, Va. 22401	

Property Address	602 Lee Dr.	7778-85-2666
Owner Name	United States of America	**GPIN NUMBER**
Mailing Address	120 Chatham Lane	
City, State, Zip	Fredericksburg, Va. 22405	

Property Address		
Owner Name		**GPIN NUMBER**
Mailing Address		
City, State, Zip		

Property Address		
Owner Name		**GPIN NUMBER**
Mailing Address		
City, State, Zip		

Property Address		
Owner Name		**GPIN NUMBER**
Mailing Address		
City, State, Zip		

PLAT OF SURVEY

SHOWING HOUSE LOCATION

LOCATED IN THE CITY OF FREDERICKSBURG, VIRGINIA

KNOWN AS TAX MAP 262J, PARCEL 42

BEING LOT 42, SECTION 3, BRAEHEAD WOODS

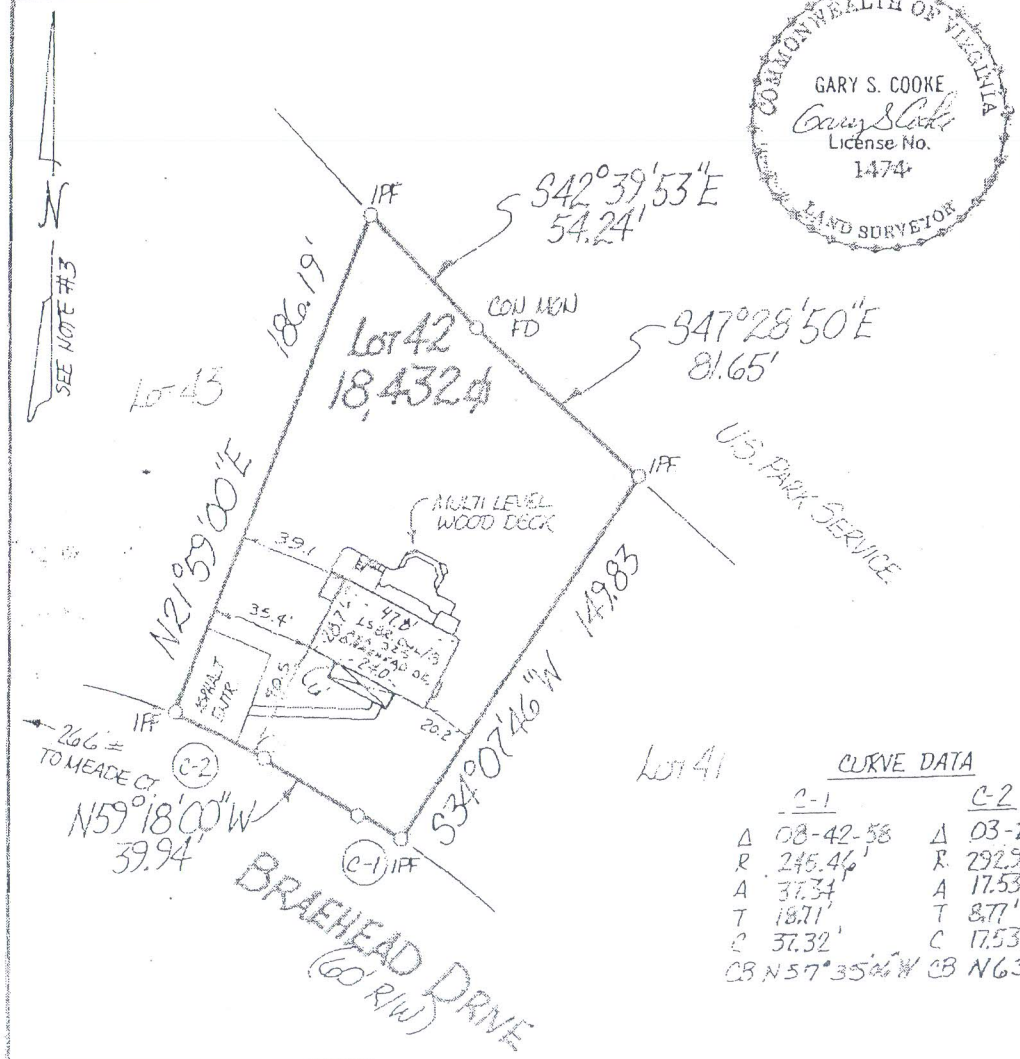
STANDING IN THE NAME OF WALKER, NATIALY A. & KISS, IRENE L., RECORDED IN DEED BOOK 187 @ PAGE 52

SURVEYED FOR NATIALY A. WALKER & IRENE L. KISS

NOTES:

1) NO TITLE REPORT FURNISHED THIS SURVEYOR.
2) SUBJECT TO ALL EASEMENTS & RESTRICTIONS OF RECORD OR OTHERWISE.
3) MERIDIAN & BOUNDARY DESCRIPTION BASED ON PLAT RECORDED IN PLAT BOOK 2, @ PAGE 20.
4) SUBSURFACE UTILITIES & FACILITIES NOT SHOWN MAY EXIST.
5) THIS PLAT REPRESENTS A CURRENT FIELD SURVEY BY THIS SURVEYOR.
6) NOT IN H.U.D. FLOOD HAZARD AREA.
7) IPF DENOTES IRON PIPE FOUND CONC MON FD DENOTES CONCRETE MONUMENT FOUND

COMMONWEALTH OF VIRGINIA
GARY S. COOKE
Gary S. Cooke
License No. 1474
LAND SURVEYOR



CURVE DATA

	C-1		C-2
Δ	08-42-58	Δ	03-25-44
R	246.46'	R	292.93'
A	37.34'	A	17.53'
T	18.71'	T	8.77'
C	37.32'	C	17.53'
CB	N57°35'00"W	CB	N63°39'29"W

FILE NUMBER
111-262 J - 4 - BRAEHEAD WOODS

SURVEYED BY: GARY S. COOKE L.S.
2601 PRINCESS ANNE STREET
FREDERICKSBURG, VA 22401
(703) 371-0953

SCALE: 1" = 50'

MAY 6, 1986

To Whom It May Concern,

My objective is to be the host of and provide a place to stay for Airbnb guests, utilizing my basement, which has a private entrance, bedroom, bathroom, and living area. It is unknown if anyone will choose my property as an Airbnb choice, but my hope is to host at least 2 reservations a month.

No member of the City Council or the Planning Commission or any member of their immediate household or family owns or has any financial interest in my property/venture or has any financial interest in the outcome of the decision.

Guest will park in my 28' x 37' asphalt driveway, which has ample parking for at least 4 average-sized vehicles.

Guests will have no negative impact on existing and planned uses of abutting and neighboring properties. Family gatherings, parties, etc., will not be allowed and/or permitted and in no way encouraged. Quiet hours will be from 10:00 pm to 7:00 am.

Catherine F. Dodd

Catherine Dodd

NOTICE
PUBLIC HEARING

The City of Fredericksburg, VA

Legend

- City Boundary
- WVS_Centerlines Back (12,000)
  - Interstate
  - US Highway
  - VA Primary
  - Others
- WVS_Centerlines Back (12,000)
  - Interstate
  - US Highway
  - VA Primary
  - Others
- Parcels

Feet

0 20 40 60 80

1:1,200 / 1"=100 Feet

7/1/2016

DISCLAIMER:All information depicted on this map shall be treated as confidential information and shall only be used for the sole purpose for which it was provided. Anyother use of this map, or the information included thereon, is strictly prohibited. The data shown on this map is for information purposes only and shall not be relied upon for the specific location of map features. The City of Fredericksburg makes no representation or warranty as to the accuracy of the map, or the information shown thereon. This map may not be copied or otherwise made available to any other party in paper or electronic format without written consentfrom the City of Fredericksburg.

MEMORANDUM

TO: Chairman Roy E. McAfee and Planning Commissioners
FROM: Mike Craig, Zoning Administrator
DATE: July 6, 2016 for July 13 meeting
RE: **Zoning map amendment of GPIN 7870-00-3906 (the "Property") from R-12 to R-2**.

ISSUE

Should the Planning Commission initiate a zoning map amendment of GPIN 7870-00-3906 from R-12 to R-2 to address an error made in Ordinance 14-06?

RECOMMENDATION

Recommend approval of the rezoning to the City Council.

GENERAL BACKGROUND

The proposed rezoning before the Planning Commission tonight would rezone GPIN 7870-00-3906 from R-12, Residential to R-2, Residential as shown on the attached Exhibit A and B.

GPIN 7870-00-3906 is a 0.806 acre parcel adjacent to Wicklow Drive across from the Riverwalk subdivision and between the Bragg Hill townhomes fronting on Rann Court to the south and the Sunshine Ballpark to the north. The parcel is an undeveloped, generally flat, open field. The Bragg Hill Corporation owns an adjacent vacant 33.96 acre parcel of land now known as GPIN 7860-90-3994. Neither vacant property has been assigned a street address by the City.

On February 11, 2014 the City Council adopted Ordinance 14-06, which rezoned all the remaining R-1 zoned property (1,121 acres of land) in the City.[1] As listed in the Ordinance's Exhibit A, properties with an assigned street address were rezoned by that address. Properties without street addresses were rezoned by GPINs. The rezoning included the Property; however, it was not at that time identified as an independent GPIN. The Property was at the time also owned by the Bragg Hill Corporation and was included as part of GPIN 7860-90-3994.[2] Ordinance 14-06 rezoned GPIN 7860-90-3994 from R-1 to R-2. The Property itself was not created as an independent feature on the City's GIS map and assigned its own GPIN (GPIN 7870-00-3906) until September 17, 2015, which was over a year and a half after the adoption of Ordinance 14-06.[3]

---

[1] Exhibit 1, Ordinance 14-06 including Exhibit A and maps.
[2] Exhibit 2, Memorandum from Kim Williams, GIS Analyst
[3] GPIN numbers are a representation of land updated and maintained as part of the City's Geographic Information System (GIS). The GIS system contains a disclaimer that the GIS system is neither a survey product nor replacement for appropriate deed research.

The Property was conveyed from Bragg Hill Community Corporation to Bragg Hill Corporation in October 2013.[4] The required "cover sheet" prepared for the Clerk of Court by the landowner's private attorney for recording the deed identifies the subject Parcel as GPIN 7860-90-9711. This identification was erroneous and was likely the product of an ambiguity in the land records dating back to 1976.[5]

This error was transferred from the Court Clerk's Office into the City's Real Estate records, resulting in a change in the information underlying the mapped GPIN. The real estate information (and subsequent tax bills) underpinning GPIN 7860-90-9711 became a mixture of information related to GPIN 7860-90-9711 as mapped on the City's official GIS map (which did not include what is now GPIN 7870-00-3906 according to Kim William's memo) and the Property. Ordinance 14-06 rezoned GPIN 7860-90-9711, which as the deeded "open space" associated with the Bragg Hill townhomes, from R-1 to R-12.

The result of this discrepancy was that during the rezoning process in 2014, City mapping and notification treated the Property as part of GPIN 7860-90-3994, which was rezoned from R-1 to R-2,[6] yet in December 2013, the City began to issue tax bills for the Property referring to it as GPIN 7860-90-9711 and taxing it as R-12 zoned property.

On February 29, 2016, Mark Glazebrook, one of the two owners of a 0.806 acre parcel of land, applied for a Technical Review Committee pre-application conference to discuss building townhomes on the Parcel under a purported R-12 zoning designation. [7]

On March 10, 2016, the Zoning Administrator sent the Bragg Hill Corporation a determination letter stating that the property is actually zoned R-2, Residential.[8] The R-2 district permits single family dwellings at a maximum density of 2 dwelling units per acre, but it does not permit townhouse (single family attached) development. Bragg Hill Corporation filed an appeal to the Board of Zoning Appeals, contesting the determination that the land is zoned R-2 and not R-12.

On May 16, 2016, the City's Board of Zoning Appeals (BZA) upheld the appeal finding that there was sufficient evidence that the GPIN recorded in the land records superseded the City's GPIN mapping in place in 2014 and that the Property was zoned R-12. The decision of the BZA is binding on the parties.

PURPOSE OF ORDINANCE 14-06

The purpose of Ordinance 14-06 was to make City planning and zoning more efficient. The rezoning was a City- initiated rezoning whose intent was to bring all the remaining land annexed by the City in 1984 zoned R-1 into conformance with the newly adopted Unified Development Ordinance by either transferring the land from the defunct R-1 zoning district to the R-2 zoning district or to otherwise bring the existing uses established on lands annexed by the City into zoning districts that reflect their use in accord with sound planning practices. The update was a logical step after the adoption of the Unified Development Ordinance, which was the City's first

[4] Exhibit 3, Deed from Bragg Hill Community Corporation to Bragg Hill Corporation, dated October 31, 2013.
[5] Exhibit 4, History of the Property.
[6] GPIN 7860-90-9711 was identified correctly as shown in Kim William's memo and owned by the Bragg Hill Community Corporation.
[7] Exhibit 5, Pre-application Conference application.
[8] Exhibit 6, Zoning Administrator Determination Letter

comprehensive zoning update since 1984.

Vacant developable land was not intended to be upzoned by the ordinance. The only vacant land that was supposed to be zoned to R-12, R-16, or R-30 was the deeded open space associated with existing higher density projects. Because the intent of the ordinance was to bring development on the ground into conformance with the zoning ordinance, the impacts associated with upzoning vacant land were not studied or considered during the process leading to the adoption of 14-06.

The intensity of potential development on the 0.806 acre Property would not have changed in 2014 if the City rezoned the Property from R-1 to R-2 as intended. Increasing the density on the Property to R-12 will have external effects on surrounding land uses and neighborhoods. The only public speaker during the May 16 Board of Zoning Appeals hearing raised concerns about the impacts of more intense development on her house in the adjacent neighborhood. This correction is necessary so that if a higher intensity use is proposed on the Property in the future then the public, the Planning Commission, and the City Council will have an opportunity to properly evaluate any potential impacts and make an informed legislative decision on whether or not the increased intensity should be permitted.

The 2015 Comprehensive Plan Future Land Use Map designates the Property for "Low Density Residential," which is consistent with the intended and proposed R-2 zoning classification.

CONCLUSION:
The staff report and mapping associated with Ordinance 14-06 clearly showed the Property as being zoned from R-1 to R-2. The BZA found that there was a significant enough error that the Property was zoned instead to R-12. The proposed rezoning before the Planning Commission will correct that error.

ATTACHMENTS:

1. Proposed Ordinance
2. Exhibits A and B
3. Exhibits 1- 6

MOTION: **[date]**
Regular Meeting
SECOND: **Ordinance No. 16-__**

RE: **AMENDING ORDINANCE 14-06, TO REZONE APPROXIMATELY 0.806 ACRES OF LAND ADJACENT TO THE UNBUILT BAKERSFIELD LANE RIGHT OF WAY, A PORTION OF FORMER BRAGG HILL PARCEL B-5, IDENTIFIED AS GPIN 7870-00-3906, FROM R-12 TO R-2**

ACTION: **APPROVED; Ayes: 0; Nays: 0**

First read: _____ **Second read:** _____

IT IS HEREBY ORDAINED by the Fredericksburg City Council that the official zoning map of the City, established pursuant to City Code §72-30, is amended as follows:

I. Purpose and findings.

The subject parcel was included in an area of 2,963 acres of land annexed by the City effective January 1, 1984. At the time of annexation, the land was initially classified as R-1 Residential zoning with the intent to rezone the land to a more appropriate zoning district at a later date. The subject property continued to be zoned R-1 until the adoption of Ordinance 14-06 by City Council on February 11, 2014. The purpose of Ordinance 14-06 was to reclassify that portion of the annexed land which had not already been rezoned into a zoning district more suited to its existing or planned development.

At the time of the adoption of Ordinance 14-06, according to City records, the subject parcel was a portion of a larger parcel identified as GPIN 7860-90-3994. Ordinance 14-06 ostensibly rezoned the subject property from R-1 to R-2. However, in February 2016, the current owner of the property asserted an R-12 zoning of the property. The Zoning Administrator provided a written determination that the property had been zoned R-2 by Ordinance 14-06. An adjoining landowner appealed this decision to the Fredericksburg Board of Zoning Appeals

The adjoining landowner's contention was that the subject property was identified as GPIN 7860-90-9711 at the time of the adoption of Ordinance 14-06. That parcel, identified in Exhibit A to the ordinance, was rezoned from R-1 to R-12 by the ordinance. The BZA upheld the appeal, determining that the land had been zoned R-12 by Ordinance 14-06.

The purported rezoning of the subject parcel from R-1 to R-12 would have been a mistake by the governing body. At the time of adopting Ordinance 14-06, the City Council was unaware of any ambiguity or confusion as to the property identified as GPINs 7860-90-3994 and 7860-90-9711. The GIS map was subsequently revised to assign GPIN 7870-00-3906 to this 0.806 acre parcel.

In adopting this ordinance, City Council has considered the applicable factors in Virginia Code § 15.2-2284. The City Council has determined that public necessity, convenience, general welfare and good zoning practice favor the requested rezoning.

II. Official Zoning Map Amendment

The official zoning map, prepared in accordance with City Code §72-30, is hereby amended by rezoning the 0.8 acre parcel identified as GPIN 7870-00-3906, more particularly described on the plat of survey entitled "Plat of Survey Showing 0.806 Acres in the Name of Bragg Hill Community Corporation," prepared by Mark D. Goodpasture, L.S., of Bagby, Caldwell and Associates, Inc., a copy of which plat is attached as Exhibit A. Ordinance 14-06 is so amended.

III. Effective Date

This ordinance is effective immediately.

Votes:
Ayes:
Nays:
Absent from Vote:
Absent from Meeting:

Approved as to form:

_____
Kathleen Dooley, City Attorney

****

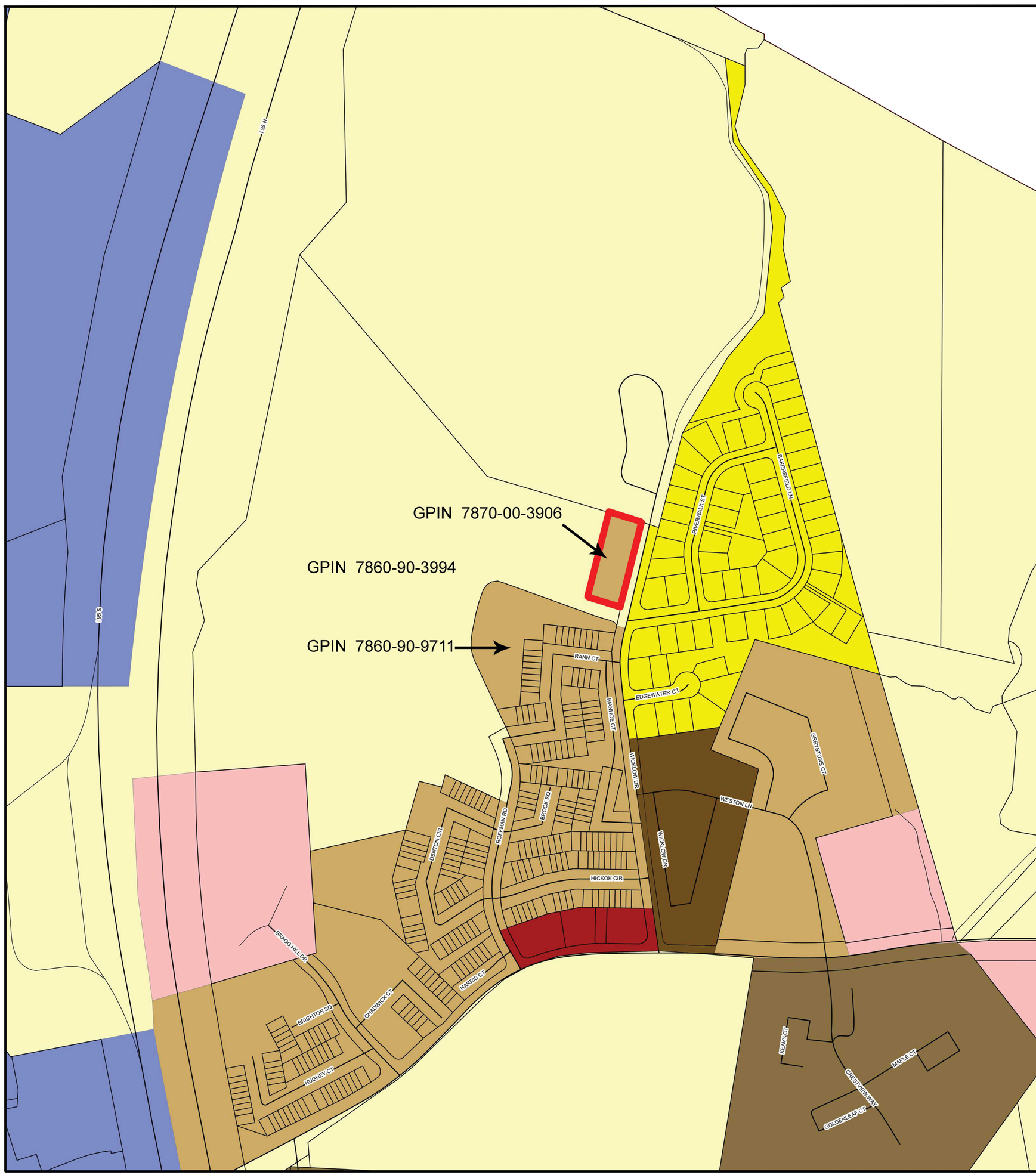
Clerk's Certificate

I, the undersigned, certify that I am Clerk of Council of the City of Fredericksburg, Virginia, and that the foregoing is a true copy of Ordinance No. 16-_ duly adopted at a meeting of the City Council meeting held Date, 2016 at which a quorum was present and voted.

_____
Tonya B. Lacey, CMC
Clerk of Council

EXHIBIT A

EXISTING ZONING
GPIN 7870-00-3906



GPIN 7870-00-3906

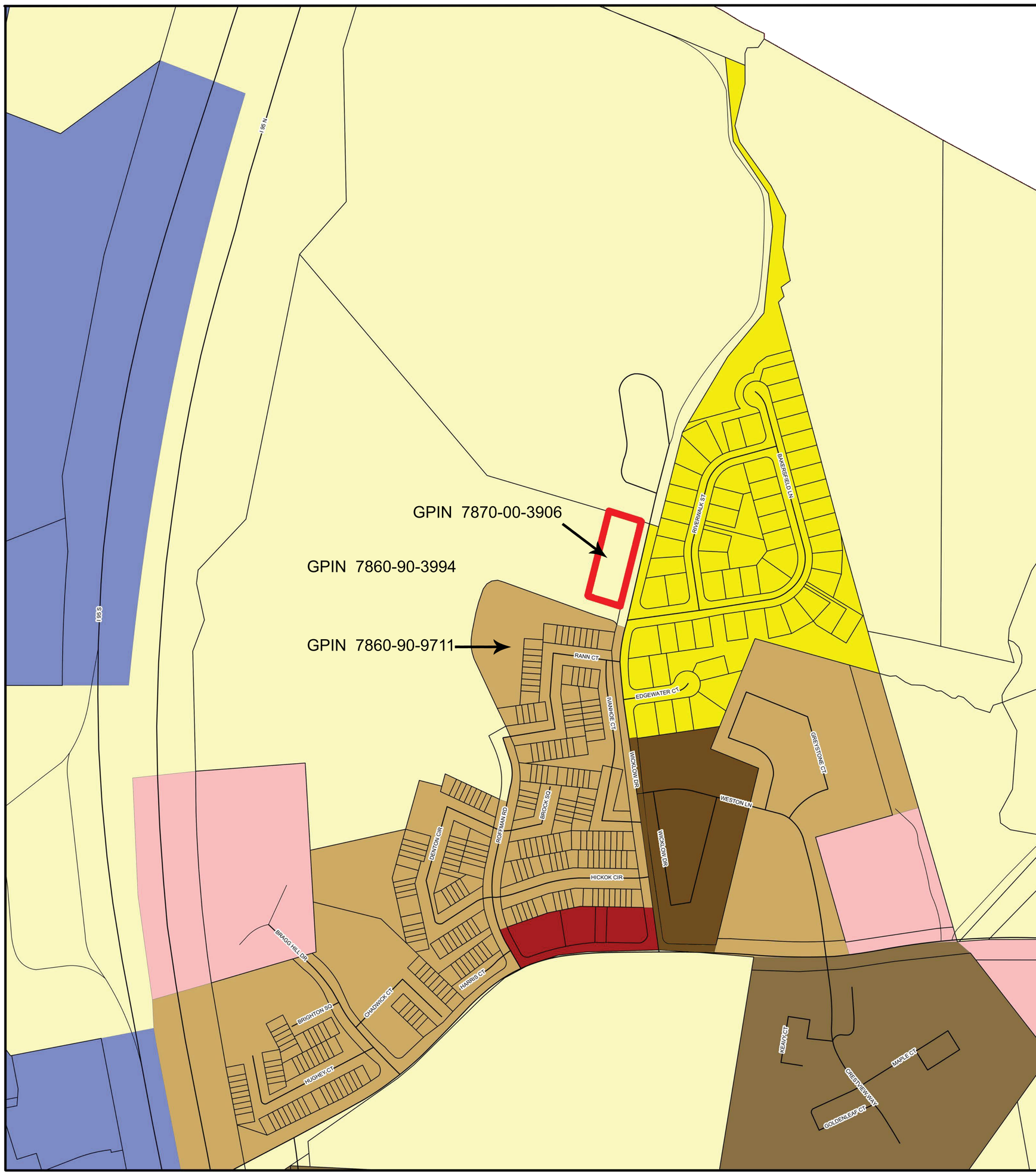
Legend

- R-2 - RESIDENTIAL
- R-4 - RESIDENTIAL
- R-8 - RESIDENTIAL
- R-12 - RESIDENTIAL
- R-16 - RESIDENTIAL
- R-30 - RESIDENTIAL
- R-MH - RESIDENTIAL MOBILE HOME
- C-T - COMMERCIAL / TRANSITIONAL OFFICE
- C-D - DOWNTOWN BUSINESS
- C-SC - COMMERCIAL SHOPPING CENTER
- C-H - COMMERCIAL HIGHWAY
- I-1 - INDUSTRIAL - LIGHT
- I-2 - INDUSTRIAL - GENERAL
- PD-R - PLANNED DEVELOPMENT - RESIDENTIAL
- PD-C - PLANNED DEVELOPMENT - COMMERCIAL
- PD-MU - PLANNED DEVELOPMENT - MIXED USE
- PD-MC - PLANNED DEVELOPMENT - MEDICAL CENTER

- Road Centerlines
- Rail Roads
- City Boundary

EXHIBIT B

PROPOSED ZONING
GPIN 7870-00-3906



GPIN 7870-00-3906

Legend

- R-2 - RESIDENTIAL
- R-4 - RESIDENTIAL
- R-8 - RESIDENTIAL
- R-12 - RESIDENTIAL
- R-16 - RESIDENTIAL
- R-30 - RESIDENTIAL
- R-MH - RESIDENTIAL MOBILE HOME
- C-T - COMMERCIAL / TRANSITIONAL OFFICE
- C-D - DOWNTOWN BUSINESS
- C-SC - COMMERCIAL SHOPPING CENTER
- C-H - COMMERCIAL HIGHWAY
- I-1 - INDUSTRIAL - LIGHT
- I-2 - INDUSTRIAL - GENERAL
- PD-R - PLANNED DEVELOPMENT - RESIDENTIAL
- PD-C - PLANNED DEVELOPMENT - COMMERCIAL
- PD-MU - PLANNED DEVELOPMENT - MIXED USE
- PD-MC - PLANNED DEVELOPMENT - MEDICAL CENTER

- Road Centerlines
- Rail Roads
- City Boundary

EXHIBIT 1

MOTION: **PAOLUCCI**

SECOND: **KELLY**

February 11, 2014
Regular Meeting
Ordinance No. 14-06

RE: **REZONING APPROXIMATELY 1,121 ACRES FROM R-1 RESIDENTIAL TO R-2 RESIDENTIAL, R-12 RESIDENTIAL, R-16 RESIDENTIAL, OR R-30 RESIDENTIAL**

ACTION: **APPROVED; Ayes: 7; Nays: 0**

FIRST READ: **January 28, 2014** **SECOND READ:** **February 11, 2014**

IT IS HEREBY ORDAINED by the Fredericksburg City Council that the Official Zoning Map of the City, established under the Unified Development Ordinance §72-30, is amended as follows:

I. Background Information

On November 13, 2013, the Planning Commission initiated an application to rezone approximately 1,121 acres of land from R-1 Residential to R-2, R-12, or R-16 Residential. All of the subject land is included in the 2,963 acres of land annexed by the City effective January 1, 1984. At the time of annexation, the land was initially classified as R-1 Residential zoning with the intent to rezone the land to a more appropriate zoning district at a later date. Over the years, 1,842 acres have been rezoned. The purpose of this zoning map amendment is to reclassify the remaining land into a zoning district more suited to its existing or planned development.

The Planning Commission conducted a public hearing on this ordinance on December 11, 2013 and adopted a motion to recommend the zoning map amendment at that meeting. The City Council conducted a public hearing on January 28, 2014. In adopting this ordinance, City Council has considered the applicable factors in Virginia Code § 15.2-2284. The City Council has determined that public necessity, convenience, general welfare and good zoning practice favor the requested rezoning.

II. Official Zoning Map Amendment

The Official Zoning Map, prepared in accordance with Unified Development Ordinance §72-30, is hereby amended by rezoning approximately 1,121 acres of land from R-1 Residential to R-2, R-12 or R-16 Residential, as more particularly described in Exhibit A, "Properties Rezoned from R-1 Residential to R-2, R-12, or R-16 Residential by Ordinance 14-06, Adopted by the Fredericksburg City Council February 11, 2014."

III. Effective Immediately

This ordinance is effective immediately.

EXHIBIT 1

Approved as to form:

Kathleen Dooley, City Attorney

****

Clerk's Certificate

I, the undersigned, certify that I am Clerk of Council of the City of Fredericksburg, Virginia, and that the foregoing is a true copy of Ordinance No. 14-06 duly adopted at a meeting of the City Council meeting held February 11, 2014 at which a quorum was present and voted.

Tonya B. Lacey, CMC
Clerk of Council

EXHIBIT 1

PROPERTIES REZONED FROM R-1 RESIDENTIAL TO R-2, R-12, OR R-16 RESIDENTIAL

BY ORDINANCE 14-06

ADOPTED BY THE FREDERICKSBURG CITY COUNCIL FEBRUARY 11, 2014

1. **The following properties are rezoned from R-1, Residential to R-2, Residential:**

300-501 Altoona Dr.,

2-27 Apache Terr.,

1000-1014 Black Oak Ct.,

6-44 Briscoe Ln.,

1000-1210 Century Oak Dr.,

10-40 Curtis Est.,

3219-3468 Fall Hill Av.,

301-304 Falling Creek Rd.,

1800-1829 Genther Ln.,

6400 Gordon W. Shelton,

1002-1200 Great Oaks Ln.,

2101-2207 Hays St.,

1001-1019 Hickory Ct.,

1000-1021 Jami's Pl.,

2231 Jeff Davis Hwy.,

1000-1008 Jessi's Av.,

1002-1014 Jill's Pl.,

1002-1006 Jon's Pl.,

1000-1009 Julia's Pl.,

1109 Mahone St.,

1-9 Matoca Ct.,

1002-1005 Oakwood Ct.,

1005-1101 Oakwood St.,

2-32 Pawnee Dr.,

1-8 Peace Pipe Ln.,

104-125 Poplar Dr.,

1303-1428 Preserve Ln.,

5321-5517 River Rd.,

10-43 Seneca Terr.,

3403 Vidalia St.,

1102-1109 Westwood Dr.,

1200 Wicklow Dr.,

1711-1805 A-D William St.,

101-142 Woodland Rd.,

GPIN #s

7769-77-8378 (no address),

7769-16-0941 (no address),

7769-26-0788 (no address),

7769-47-1903 (no address),

7779-24-2528 (no address),

7870-11-7643 (no address),

7870-11-1775 (no address),

EXHIBIT 1

7870-10-4269 (no address),

7870-21-0133 (no address),

7870-10-4527 (no address),

7870-20-6853 (no address),

7870-21-8644 (no address),

7870-21-4459 (no address),

7870-30-5391 (no address),

7779-29-6826 (no address),

7779-29-2738 (no address),

7769-94-7825 (no address),

7779-15-3264 (no address),

7779-15-1314 (no address),

7779-05-9510 (no address),

7779-05-5551 (no address),

7870-03-1000 (no address),

7860-90-3994 (no address),

7779-22-4866 (no address),

7779-33-3632 (no address),

7779-34-8153 (no address),

7779-33-7697 (no address),

7779-23-5833 (no address),

7779-23-6834 (no address),

7779-23-7980 (no address),

7779-32-4817 (no address),

7778-16-6891 (no address),

7779-24-4390 (no address),

7779-04-4091 (no address),

7779-05-7004 (no address),

7860-52-1115 (no address),

7860-72-2838 (no address),

7779-07-7560 (no address),

7769-98-2024 (no address),

7779-17-0369 (no address),

7779-06-2534 (no address),

7769-96-4560 (no address),

7779-14-5535 (no address),

7779-08-6240 (no address),

7779-06-4427 (no address),

7779-07-1395 (no address),

7779-00-6239 (no address),

7778-06-2695 (no address),

7779-59-0836 (no address), and

7779-08-2325 (no address).

EXHIBIT 1

2. The following properties are rezoned from R-1, Residential to R-12, Residential:

200-222 Brighton Sq.,

317-343 Brock Sq.,

400-416 Chadwick Ct.,

600-817 Denton Cir.,

501-517 Harris Ct.,

100-322 Hickok Cir.,

100-152 Hughey Ct.,

218-241 Ivanhoe Ct.,

400-445 Rann Ct.,

900-1009 Roffman Rd.,

GPIN #

7769-99-0343 (no address),

7769-99-7765 (no address),

7769-99-4595 (no address),

7779-09-1846 (no address),

7870-00-2360 (no address), and

7860-90-9711 (no address),.

EXHIBIT 1

3. The following properties are rezoned from R-1, Residential to R-16, Residential:

1000 Heritage Park Dr.

1009 Heritage Park Dr.

GPIN # 7769-98-1474 (no address)

4. The following property is rezoned from R-1, Residential to R-30, Residential:

1099 Wicklow Dr.

EXHIBIT 1

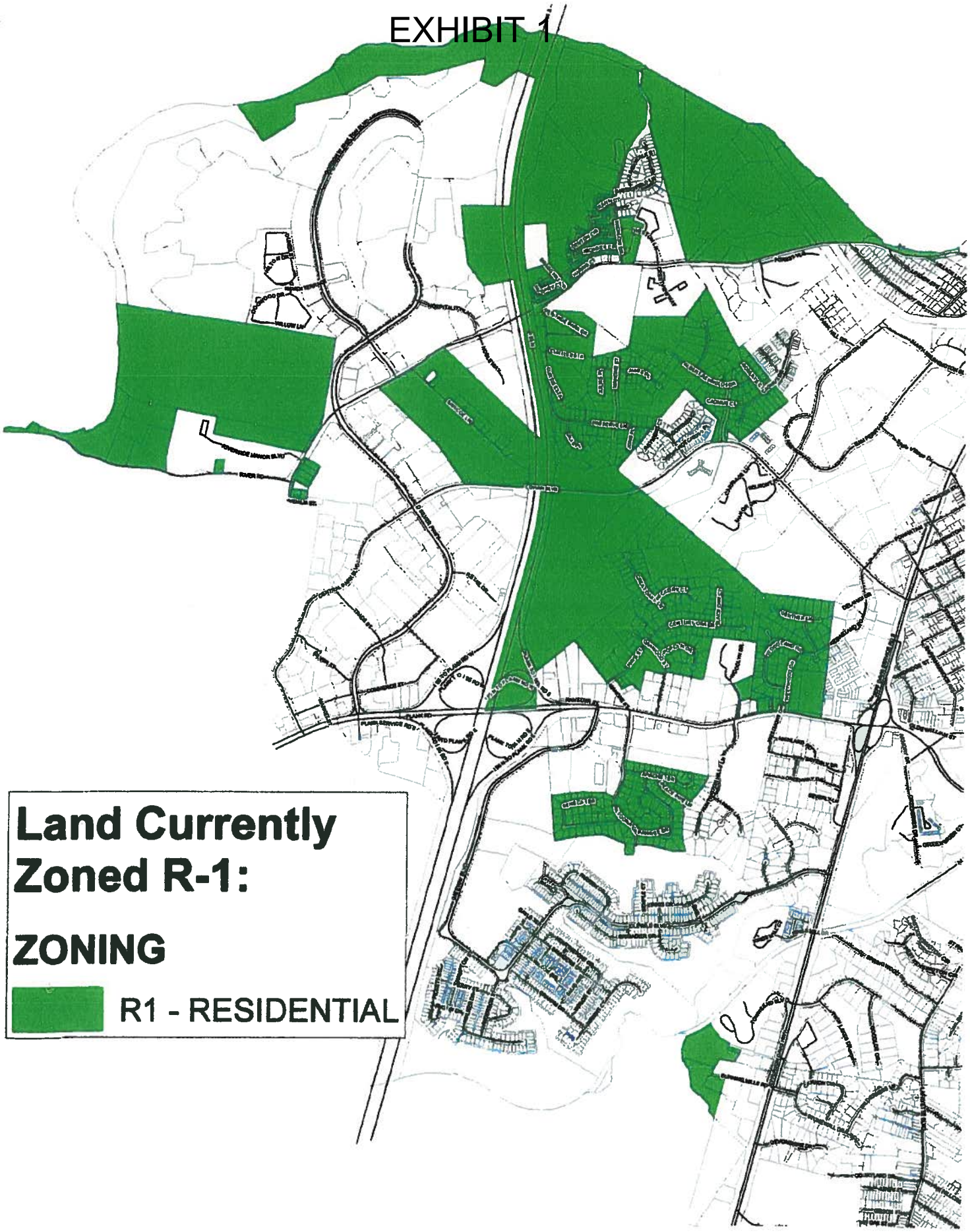


EXHIBIT 1

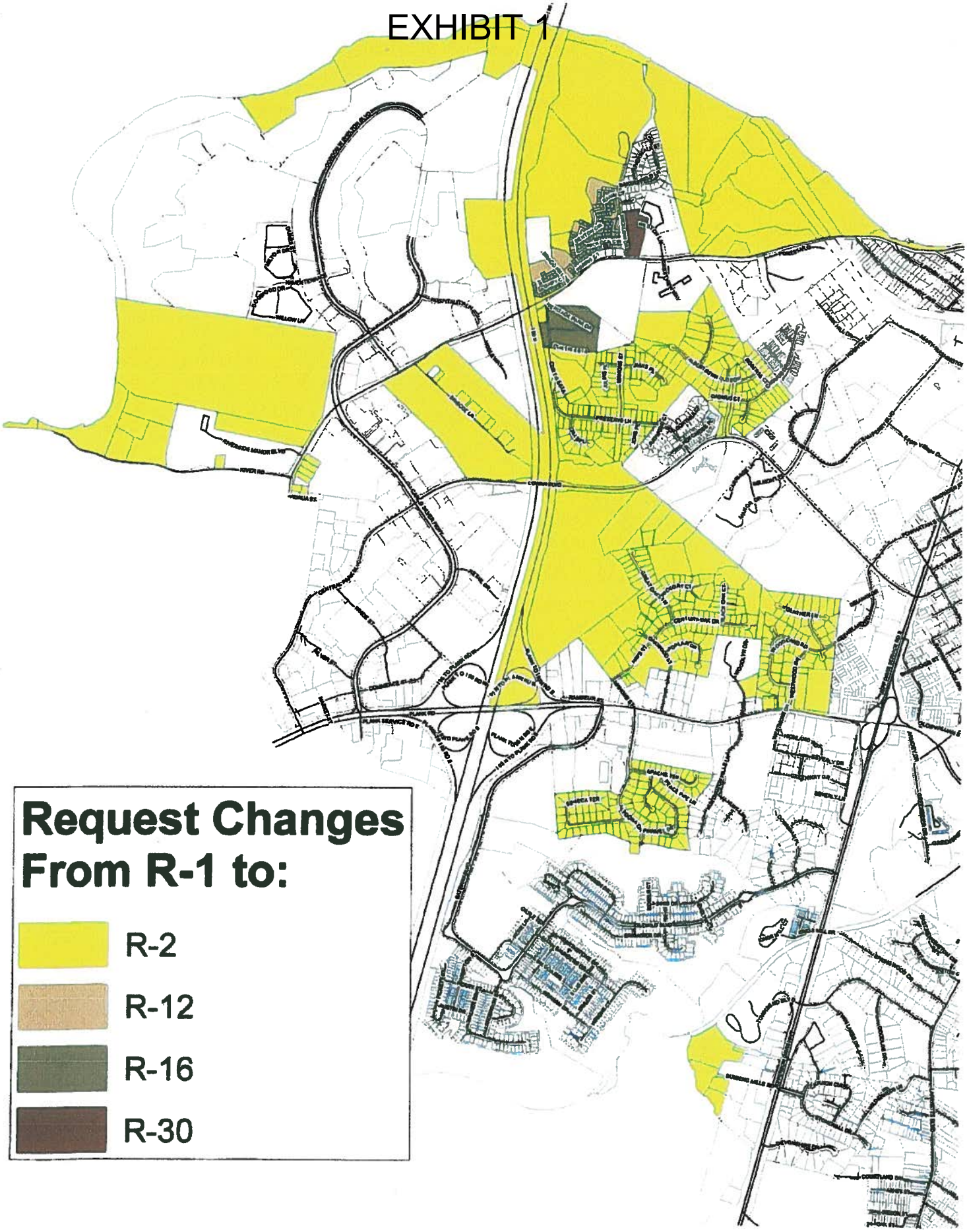


EXHIBIT 2

MEMORANDUM

TO: Mike Craig, Zoning Administrator and Kathleen Dooley, City Attorney
FROM:
DATE: May 10, 2016 (for May 16 meeting)
RE: Board of Zoning Appeals – GPIN 7870-00-3906

BACKGROUND

The City of Fredericksburg built its Geographic Information System (GIS) in 2009-2010. Property lines in the City were drawn based on property lines shown in Tax Maps at that time. The section of the City now in question was drawn based on 2009 Tax Map page A19, attached. The 2009 Tax Map included the subject parcel in A19-84A. The whole Tax Map parcel A19-84A became 7860-90-3994 in the new GIS system.

Therefore, on February 11, 2014, the GIS did not represent the .806 acre piece of land now identified as 7870-00-3906 as its own parcel due to the fact that this piece of land was part of the larger 33.962 acre parcel identified as 7860-90-3994 on the City tax maps.

The .806 acre parcel identified as 7870-00-3906 was created in the GIS on September 17, 2015 in response to a request from Real Estate. Attached are renditions of both how this area of the City appeared in the City of Fredericksburg GIS prior to September 17, 2015, and after the September 2015 edits were completed.

Thank you,

Kim B. Williams

Kim B. Williams

EXHIBIT 2

Property Lines and GPINs
Prior to September 17, 2015

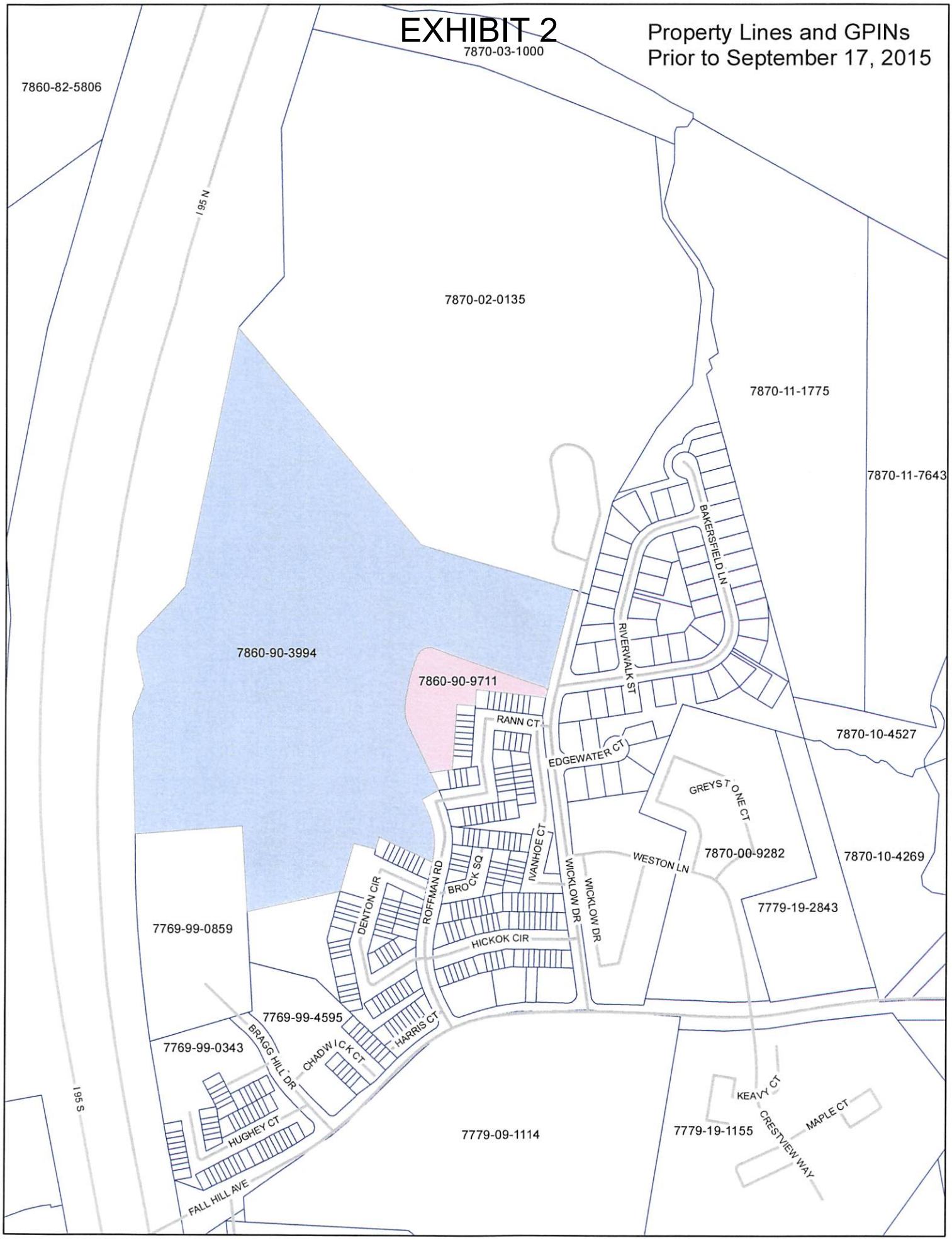


EXHIBIT 2

Property Lines and GPINs
Post to September 17, 2015

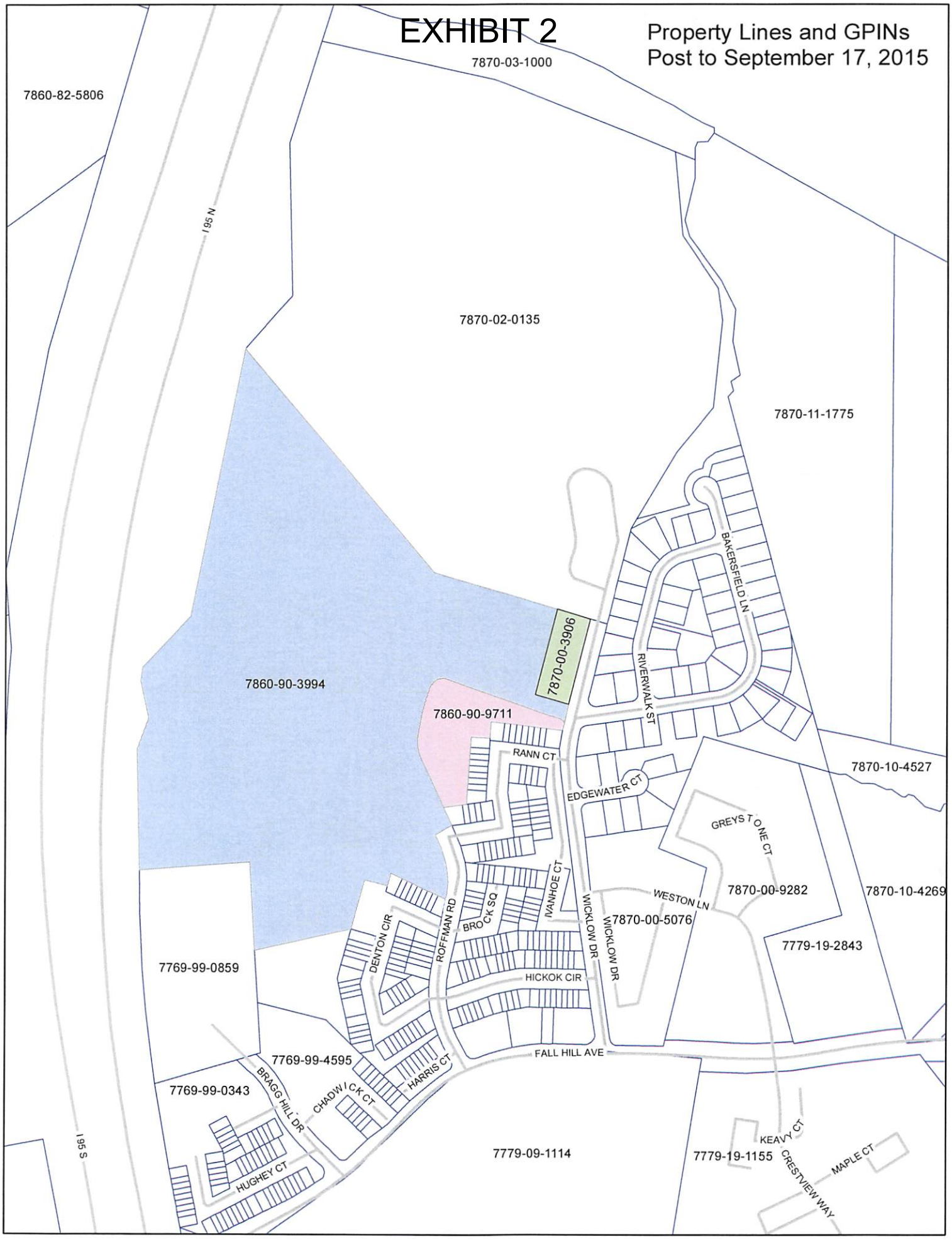
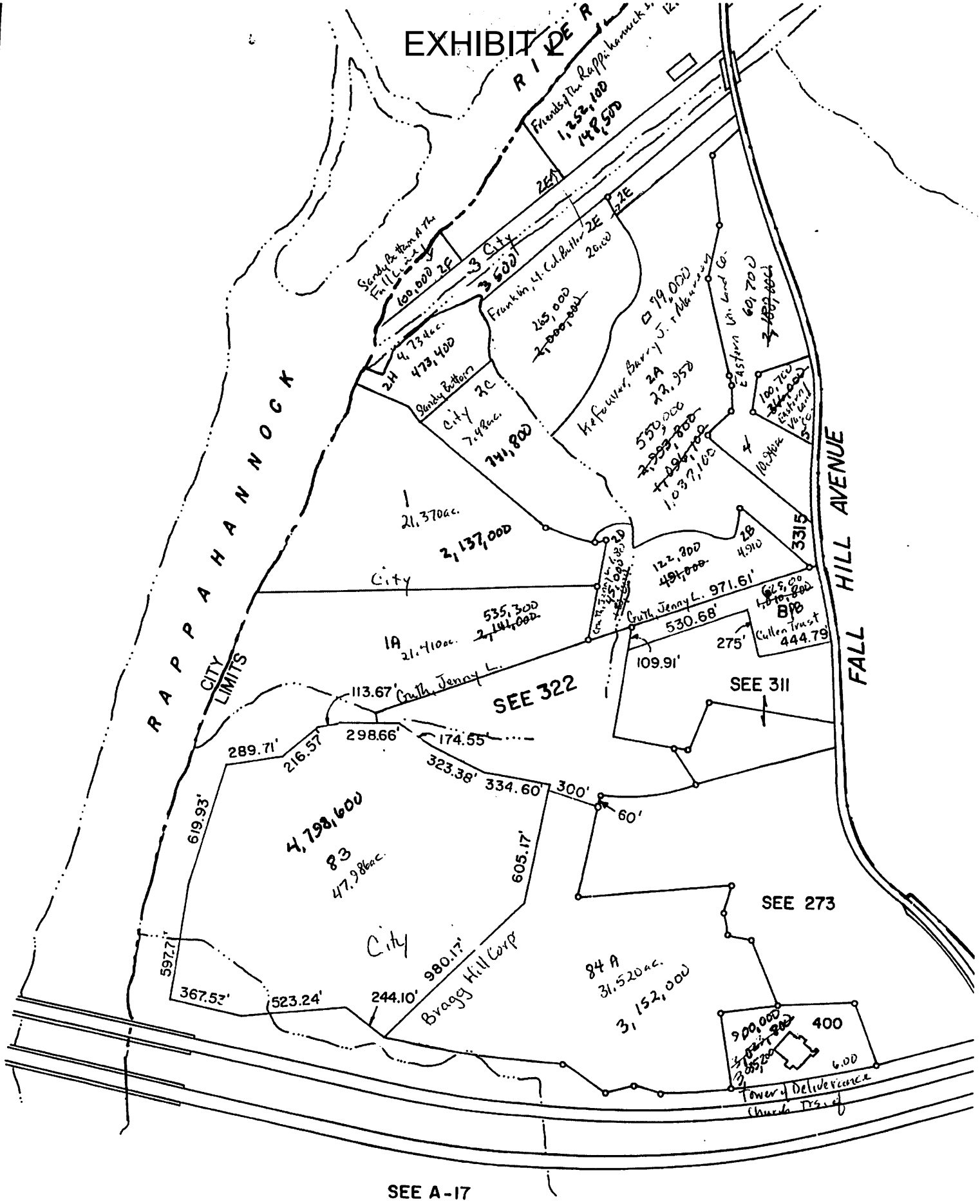


EXHIBIT E



SEE A-17

Instrument Control Number

EXHIBIT 3

Commonwealth of Virginia
Land Record Instruments
Cover Sheet - Form A

[ILS VLR Cover Sheet Agent 1.0.66]

INSTRUMENT #130002978
RECORDED IN THE CLERK'S OFFICE OF
FREDERICKSBURG CITY ON
NOVEMBER 1, 2013 AT 01:15PM
$115.00 GRANTOR TAX WAS PAID AS
REQUIRED BY SEC 58.1-802 OF THE VA. CODE
STATE: $57.50 LOCAL: $57.50

JEFFREY S. SMALL, CLERK
RECORDED BY: JLS

(Box for Deed Stamp Only)

TAX EXEMPT | CORP

Date of Instrument: [11/1/2013]
Instrument Type: [DBS]
Number of Parcels [1]
Number of Pages [3]
City [x] County [ ] [City Of Fredericksburg]

First and Second Grantors

Last Name	First Name	Middle Name or Initial	Suffix
[BRAGG HILL COMMUN]	[ ]	[ ]	[ ]
[ ]	[ ]	[ ]	[ ]

First and Second Grantees

Last Name	First Name	Middle Name or Initial	Suffix
[BRAGG HILL CORPO]	[ ]	[ ]	[ ]
[ ]	[ ]	[ ]	[ ]

Grantee Address (Name) [BRAGG HILL CORPORATION]
(Address 1) [1206 WASHINGTON AVE]
(Address 2) [ ]
(City, State, Zip) [FRED] [VA] [22401]

Consideration [115,000.00] Existing Debt [0.00] Assumption Balance [0.00]

Prior Instr. Recorded at: City [ ] County [ ] [ ] Percent. in this Juris. [100]
Book [ ] Page [ ] Instr. No [ ]
Parcel Identification No (PIN) [7860-90-9711]
Tax Map Num. (If different than PIN) [7860-90-9711]
Short Property Description [0.806 AC]
[ ]
Current Property Address (Address 1) [UNKNOWN]
(Address 2) [ ]
(City, State, Zip) [FRED] [VA] [22401]

Instrument Prepared by [M J BARRETT]
Recording Paid for by [M J BARRETT]
Return Recording to (Name) [M J BARRETT]
(Address 1) [816 WILLIAM ST]
(Address 2) [ ]
(City, State, Zip) [FRED] [VA] [22401]
Customer Case ID [13-1427] [239-13B] [ ]

EXHIBIT 3

TITLE INSURANCE UNDERWRITER: FIDELITY NATIONAL TITLE INSURANCE COMPANY

Prepared by M. J. Barrett, Esq.
(Virginia State Bar #20674)
816 William St.
Fredericksburg, Virginia 22401

Return to Grantee
Grantee's Address:
1206 WASHINGTON AVENUE
FREDERICKSBURG, VA 22401

Consideration: $115,000.00
Assessed Value: $ 0.00

Tax Parcel # 7860-90-9711

THIS DEED, made and entered into this 31ST day of OCTOBER, 2013, by and between **BRAGG HILL COMMUNITY CORPORATION,** a Virginia non-stock corporation, GRANTOR; and **BRAGG HILL CORPORATION**, a Virginia corporation, GRANTEE.

WITNESSETH:

That for and in consideration of the sum of Ten Dollars ($10.00), cash in hand paid, and other valuable consideration, the receipt of which is hereby acknowledged, the Grantor does hereby bargain, sell, grant and convey unto the Grantee, with General Warranty and English covenants of Title, in fee simple, the following described real estate, to-wit:

> All that certain lot or parcel of land with all improvements thereon and all rights and privileges appurtenant thereto, lying and being in the City of Fredericksburg, Virginia (formerly Courtland Magisterial District of Spotsylvania County, Virginia), described as **containing 0.806 acre,** more or less, on that certain plat of survey dated October 22, 2008, entitled "Plat of Survey Showing 0.806 Acres in the Name of Bragg Hill Community Corporation," prepared by Mark D. Goodpasture, L.S., of Bagby, Caldwell and Associates, Inc., a copy of which plat is attached hereto as **Exhibit A.**
>
> Being a portion of the 6.25 acres conveyed to Bragg Hill Community Corporation by deed dated April 28, 1976, from Hickok Construction Corporation, which deed is recorded among the land records of the Clerk's Office of the Circuit Court of Spotsylvania County, Virginia, in Deed Book 389, at Page 349.

MICHAEL J. BARRETT
ATTORNEY AT LAW
816 WILLIAM STREET
FREDERICKSBURG, VA 22401
(540) 371-2444

EXHIBIT 3

This conveyance is made subject to all easements, restrictions and reservations of record validly affecting the property conveyed herein.

WITNESS the following signature(s) and seal(s):

BRAGG HILL COMMUNITY CORPORATION

By: _____(SEAL)
JOHN RICE, President

STATE OF VIRGINIA

CITY/COUNTY OF FREDERICKSBURG, to-wit:

The foregoing Deed was acknowledged before me this 31ST day of OCTOBER, 2013, by JOHN RICE, who is the President of BRAGG HILL COMMUNITY CORPORATION.

My commission expires: DECEMBER 31, 2014

_____
Notary Public
Printed Name: RHONDA J. EDWARDS

Va. Notary Registration No. 170730

RHONDA J. EDWARDS
COMMONWEALTH OF VIRGINIA
REGISTRATION NO. 170730
MY COMM. EXPIRES
NOTARY PUBLIC

MICHAEL J. BARRETT
ATTORNEY AT LAW
816 WILLIAM STREET
FREDERICKSBURG, VA 22401
(540) 371-2444

EXHIBIT "A" EXHIBIT 3

1 OF 1	DATE: OCT. 22, 2003	PLAT OF SURVEY	BCA BAGBY, CALDWELL, and ASSOCIATES, P.C. CIVIL ENGINEERS AND LAND SURVEYORS
	SCALE: 1"=20'	SHOWING 0.806 ACRES IN THE NAME OF BRAGG HILL COMMUNITY CORPORATION	COMMONWEALTH OF VIRGINIA MARK D. GOODFASTER NO. 2057 LAND SURVEYOR
	DRAWN BY: JF	CITY OF FREDERICKSBURG VIRGINIA	
	REVISED BY:		
	CHECKED BY: MG		
	FILE NAME: 2003-3-JF		
	JOB NO.: 2003-3		
	Fwd no.		

DATE	REVISIONS

EXHIBIT 3

INSTRUMENT #130002978
RECORDED IN THE CLERK'S OFFICE OF
FREDERICKSBURG CITY ON
NOVEMBER 1, 2013 AT 01:15PM
$115.00 GRANTOR TAX WAS PAID AS
REQUIRED BY SEC 58.1-802 OF THE VA. CODE
STATE: $57.50 LOCAL: $57.50

JEFFREY S. SMALL, CLERK
RECORDED BY: JLS

EXHIBIT 4, HISTORY OF THE PARCEL

The history of the Parcel goes back to an October 1972 plat of "Parcel B-5," a portion of "Parcel B." At that time, this land was located in Spotsylvania County, so the plat was recorded in the land records of the Spotsylvania County Clerk of Circuit Court, in Deed Book 312, page 469.[1] At roughly the same time, the landowner recorded a subdivision plat for Bragg Hill Section 6. Bragg Hill Section 6 was comprised of a portion of Parcel B-5 and Parcel B-3, as shown on an October 1972 subdivision plat.[2] The subdivision plat shows 50 townhouse lots, plus public rights of way and "Green Area." The subject Parcel is part of Parcel B-5, but it is not shown on the subdivision plat for Bragg Hill Section 6. It lies across "Bakersfield Lane," as shown on the subdivision plat. The confusion as to the identification of the subject property probably dates back to this time, when the property was part of the parent parcel B-5 of Bragg Hill Section 6, but was dropped off of the subdivision plat.

In 1976, Hickok Construction Corporation conveyed to the Bragg Hill Community Corporation the "Green Area" of Bragg Hill Section 6 and the subject Parcel:

> "all that certain tract or parcel of land which comprises the Common Area of Section Six (6) of the subdivision of Bragg Hill . . . as shown on plat of Elliott & Associates dated October 1972, and recorded in the Clerk's Office . . . in Plat Book 10, pages 73 and 74, and being all the property designated as 6.25000 acres as shown on plat of Elliott & Associates, dated October 1972 and recorded in the aforesaid Clerk's Office in Deed Book 312, page 469."[3]

This property description reflects the confusion created by the 1972 subdivision plat – the tract or parcel of land which comprises the Common Area of Section Six as shown on the subdivision plat does not include the subject Parcel. But it is part of the property designated as the 6.25 acres on the plat of the parent parcel.

The area was annexed into the City boundaries in 1984.

In 2008, surveyor Mark D. Goodpasture prepared a survey of "0.806 Acres in the name of Bragg Hill Community Corporation."[4] This survey simply shows the boundary lines of the subject Parcel; it is not a subdivision plat. It also shows that the Parcel abuts land that had been conveyed to the Bragg Hill Corporation while the land was still in Spotsylvania County, identified on the City's tax map as parcel A19-84A.

In 2009, the City of Fredericksburg converted from paper tax maps (maintained by the Commissioner of Revenue) to a digital Geographic Information System, maintained by the IT department. The 2009 paper tax map identified the subject Parcel as a portion of a 31.520 acre parcel A19 84A. The subject Parcel was identified in the new GIS system as GPIN 7860-90-3994. The "Green Area" shown on the Bragg Hill Section 6 subdivision plat was assigned GPIN 7860-90-9711. Kim Williams, the City's GIS

---

[1] Appendix A, "Plat of Parcel B-5, a portion of Parcel B, Property of Bragg Hill," dated October 1972, recorded at Deed Book 312 page 469, in Spotsylvania County.
[2] Appendix B, "Plat of Subdivision, Section 6, Bragg Hill," dated October 1972, recorded in Spotsylvania County Plat Book 10.
[3] Appendix C, Deed recorded in Spotsylvania County Deed Book 389 page 349.
[4] Appendix D, "0.806 Acres in the Name of Bragg Hill Community Corporation."

Analyst has included a memo detailing the history of the GPIN numbers assigned to the Parcel for reference.[5]

The subject Parcel was conveyed from Bragg Hill Community Corporation to Bragg Hill Corporation in October 2013.[6] The required "cover sheet" prepared for the Clerk of Court for recording the deed identifies the subject Parcel as GPIN 7860-90-9711. This identification was erroneous. It probably arose from the 1976 identification of the Parcel as being a part of the Green Area or "Common Area" of Bragg Hill Section 6. The erroneous identification created a discrepancy between the City's GIS records and the land records.

The City sent notice of the proposed City led rezoning of the subject Parcel in November and December 2013. The GPIN identifiers listed in Kim William's memo applied to the land at the time of the 2014 City Council adoption of Ordinance 14-06, as shown on the map exhibit to the ordinance. City records indicate that notice of the rezoning of GPIN 7860-90-3994 (which included the subject Parcel) was sent to the Bragg Hill Corporation and that notice of the rezoning of GPIN 7860-90-9711 was sent, correctly, to the Bragg Hill Community Corporation.[7]

Exhibit A to the ordinance shows that GPIN 7860-90-3994 (which included the subject Parcel and was owned entirely by the Bragg Hill Corporation) is rezoned from R-1 to R-2. GPIN 7860-90-9711 (the Bragg Hill Section 6 "Green Area" owned by the Bragg Hill Community Corporation) is rezoned R-1 to R-12.[8]

In February 2014, Downtown Properties, Inc., applied for the rezoning of GPIN 7860-90-3994 from R-1 to R-12. The Generalized Development Plan attached to the rezoning application correctly shows the subject Parcel as being located within 7860-90-3994, with the "tract line to be vacated."[9] Downtown Properties, Inc. was the contract purchaser for the property. The owner of the property, Bragg Hill Corporation signed the proffer statement, by the signature of Mike Degen, a member of the corporation.

The May 15, 2015 real estate tax bill for the property incorrectly identifies it as GPIN 7860-90-9711.[10] This error by the Commissioner of Revenue was probably the result of the incorrect GPIN identification on the cover sheet for the 2013 deed. Prior to the 2014 tax cycle, GPIN 7860-90-9711 was not taxed.[11]

The GIS system was revised to identify the subject parcel as GPIN 7870-00-3906 on September 17, 2015.[12] This revision was made in response to a request by Mike Degen to the Commissioner of Revenue. He brought in the 2008 survey of the property and asked the Real Estate department to make sure to send the real estate tax bill to him. The Real Estate department conveyed the request to the GIS Analyst, who made the change in the GIS system.

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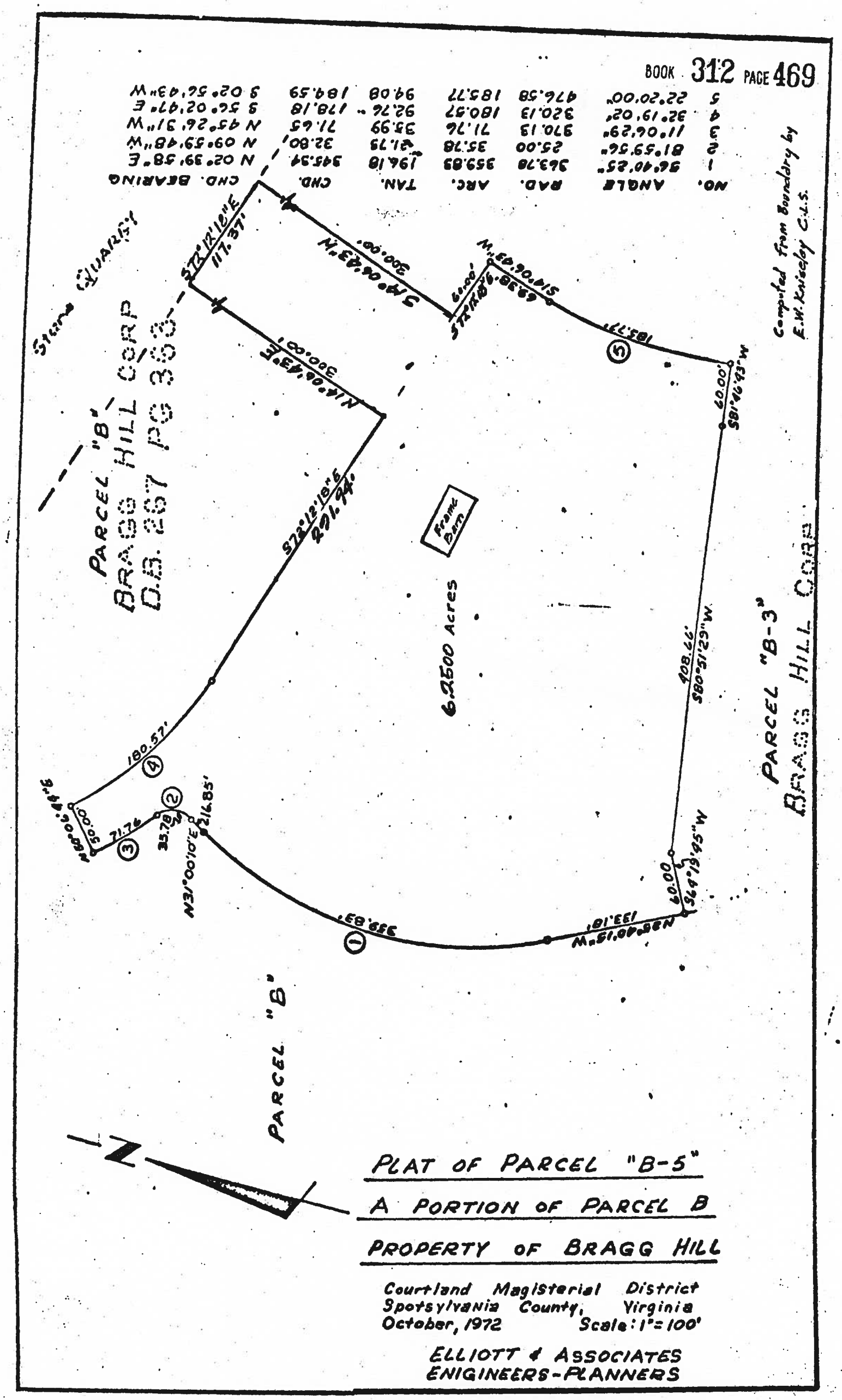
[5] Appendix E, memorandum from Kim Williams, GIS Analyst
[6] Appendix F, deed from Bragg Hill Community Corporation to Bragg Hill Corporation, dated October 31, 2013.
[7] Appendix G, excerpt from City's notification access file.
[8] Appendix H, Ordinance 14-06, with Exhibit A and map.
[9] Appendix I, Downtown Properties, Inc. rezoning application.
[10] Appendix J, tax bill submitted by the Property Owner.
[11] Appendix K, printouts from City's real estate tax billing service for GPIN 7860-90-9711.
[12] Appendix E, memorandum from Kim Williams, GIS Analyst

The January 11, 2016 GIS record, submitted by the appellant, identifies GPIN 7860-90-9711 as 0.806 acres of land. However, the copy of the map in the GIS system shows that this parcel is the "Green Area" for Section 6 of Bragg Hill. It does not show the subject Parcel as being identified with this GPIN.

On January 19, 2016, Bragg Hill Corporation conveyed the subject Parcel to Mark Glazebrook and Mike Degen, again using the GPIN 7860-90-9711 on the recordation cover sheet.[13] Mr. Glazebrook submitted the February 29, 2016 Pre-Application Conference application using this GPIN identification.

[13] Appendix L, Deed from Bragg Hill Corporation to Mark Glazebrook and Mike Degen

EXHIBIT 4 - APPENDIX A



PLAT BOOK- 10 -

DEDICATION OF THE SUBDIVISION

KNOW ALL MEN BY THESE PRESENTS, THAT THE SUBDIVISION OF LAND AS SHOWN ON THIS PLAT, CONTAINING 6.25 ACRES, MORE OR LESS, TO BE DESIGNATED AS SECTION 6, BRAGG HILL, SITUATED IN THE COURTLAND MAGISTERIAL DISTRICT IN THE COUNTY OF SPOTSYLVANIA, VIRGINIA, IS WITH THE FREE CONSENT AND IN ACCORDANCE WITH THE DESIRES OF THE UNDERSIGNED OWNERS THEREOF; THAT ALL STREETS SHOWN ON SAID PLAT ARE HEREBY DEDICATED TO THE PUBLIC USE, AND THAT ALL LOTS WITHIN THE SUBDIVISION ARE SUBJECT TO CERTAIN RESTRICTIONS, RESERVATIONS, STIPULATIONS AND COVENANTS AS CONTAINED IN A WRITING EXECUTED BY THE UNDERSIGNED, UNDER DATE OF February 19, 1973, AND RECORDED IN THE CLERK'S OFFICE OF SPOTSYLVANIA COUNTY, IN DEED BOOK 314, PAGE 224. THE SAID 6.25 ACRES OF LAND HEREBY SUBDIVIDED IS A PORTION OF 10.625 ACRES CONVEYED TO HICKOK CONSTRUCTION CORPORATION BY BRAGG HILL CORPORATION BY DEED DATED 3-6-72, AND RECORDED IN THE CLERK'S OFFICE OF THE CIRCUIT COURT OF SPOTSYLVANIA COUNTY, VIRGINIA, IN DEED BOOK 215, PAGE 270; AND A PORTION OF 6.250 ACRES CONVEYED TO HICKOK CONSTRUCTION CORPORATION BY BRAGG HILL CORPORATION BY DEED DATED 2-6-73, AND RECORDED IN THE CLERK'S OFFICE OF THE CIRCUIT COURT OF SPOTSYLVANIA COUNTY, VIRGINIA, IN DEED BOOK 312, PAGE 467.

GIVEN UNDER MY HAND THIS 13th DAY OF November, 1972

BY: E. W. Hickok
E. W. HICKOK
PRESIDENT, HICKOK CONSTRUCTION CORPORATION

SURVEYOR'S CERTIFICATE

I HEREBY CERTIFY THAT TO THE BEST OF MY KNOWLEDGE AND BELIEF, ALL OF THE REQUIREMENTS OF THE BOARD OF SUPERVISORS AND ORDINANCES OF THE COUNTY OF SPOTSYLVANIA, VIRGINIA, REGARDING THE PLATTING OF SUBDIVISIONS WITHIN THE COUNTY HAVE BEEN COMPLIED WITH, AND THE FOREGOING RECORD DATA IS CORRECT.

GIVEN UNDER MY HAND THIS 13th DAY OF November, 1972

BY: Jules L. Elliott
JULES I. ELLIOTT
STATE CERTIFIED ENGINEER, #4083 VA.

COMMONWEALTH OF VIRGINIA
JULES I. ELLIOTT
No. 4083
STATE REGISTERED PROFESSIONAL ENGINEER

CERTIFICATE OF APPROVAL

THIS SUBDIVISION, KNOWN AS SECTION 6, BRAGG HILL, IS APPROVED BY THE UNDERSIGNED IN ACCORDANCE WITH EXISTING SUBDIVISION REQUIREMENTS AND MAY BE COMMITTED TO RECORD.

(DATE) (SIGNED) _____
CHAIRMAN, PLANNING COMMISSION

11-28-72 (SIGNED) _____
(DATE) HEALTH OFFICER

(DATE) (SIGNED) _____
HIGHWAY DEPARTMENT ENGINEER

11-28-72 (SIGNED) _____
(DATE) CHAIRMAN OR AGENT
BOARD OF SUPERVISORS

THE FOREGOING PLAT IS NOT APPROVED UNTIL ALL SIGNATURES HAVE BEEN OBTAINED.

I, Jane Hart, A NOTARY PUBLIC IN AND FOR THE CITY OF Fredericksburg, VIRGINIA, DO HEREBY CERTIFY THAT E. W. HICKOK, WHOSE NAME IS SIGNED TO THE FOREGOING PLAT, HAS ACKNOWLEDGED THE SAME TO ME IN MY CITY AND STATE AFORESAID.

GIVEN UNDER MY HAND THIS 13th DAY OF November, 1972

MY COMMISSION EXPIRES August 30th, 1975.

Jane Hart
NOTARY PUBLIC

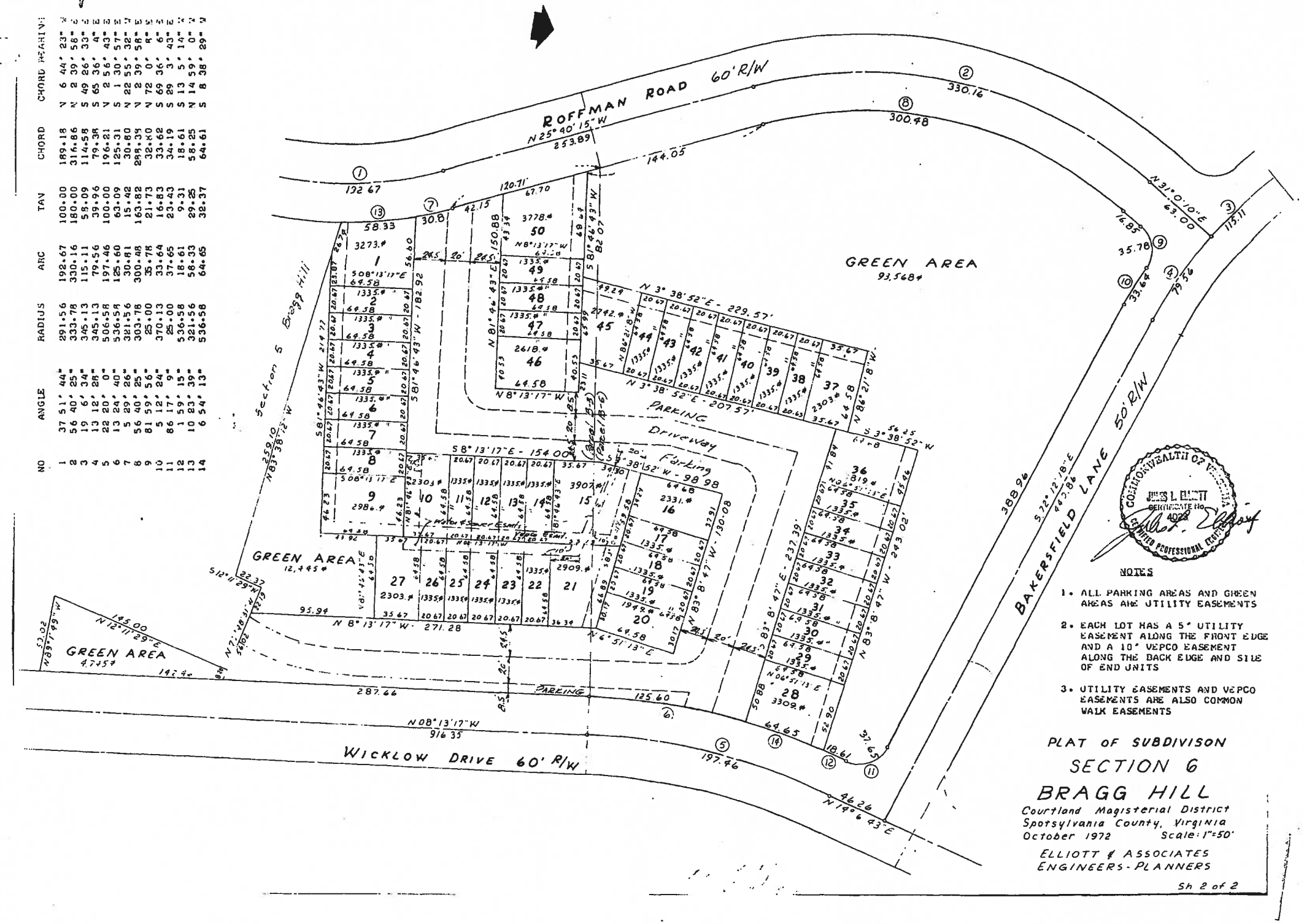
314-224
PB 10-73-74

PLAT OF SUBDIVISION
SECTION 6
BRAGG HILL
Courtland Magisterial District
Spotsylvania County, Virginia
October 1972, Scale: 1"=50'
ELLIOTT & ASSOCIATES
ENGINEER-PLANNERS
Sh 1 of 2

EXHIBIT 4 - APPENDIX B

PLAT BOOK- 10 -

NO	ANGLE	RADIUS	ARC	TAN	CHORD	CHORD BEARING
1	37 51' 44"	291.56	192.67	100.00	189.18	N 6 44' 23" W
2	56 40' 25"	333.78	330.16	180.00	316.86	N 2 30' 58" E
3	19 46' 34"	345.13	115.11	58.09	114.58	S 49 26' 33" E
4	13 12' 28"	345.13	79.56	39.96	79.38	S 65 36' 4" E
5	23 20' 0"	506.58	206.30	104.30	204.91	S 2 56' 47" E
6	13 24' 40"	536.58	197.46	100.00	196.31	S 1 30' 57" E
7	5 29' 26"	321.56	30.81	15.42	30.80	N 21 50' 32" E
8	56 40' 25"	303.78	300.48	163.82	288.39	N 2 30' 58" E
9	81 59' 56"	25.00	35.78	21.73	32.80	N 72 0' 8" E
10	5 12' 24"	370.13	33.64	16.83	33.62	S 69 36' 6" E
11	86 17' 9"	25.00	37.65	23.43	34.19	S 29 3' 43" E
12	1 59' 15"	536.58	18.61	9.31	18.61	S 13 5' 14" E
13	10 23' 39"	321.56	58.33	29.25	58.25	N 14 59' 0" W
14	6 54' 13"	536.58	64.65	32.37	64.61	S 8 38' 29" W



NOTES

1. ALL PARKING AREAS AND GREEN AREAS ARE UTILITY EASEMENTS
2. EACH LOT HAS A 5' UTILITY EASEMENT ALONG THE FRONT EDGE AND A 10' VEPCO EASEMENT ALONG THE BACK EDGE AND SIDE OF END UNITS
3. UTILITY EASEMENTS AND VEPCO EASEMENTS ARE ALSO COMMON WALK EASEMENTS

PLAT OF SUBDIVISON

SECTION 6

BRAGG HILL

Courtland Magisterial District
Spotsylvania County, Virginia
October 1972 Scale: 1"=50'

ELLIOTT & ASSOCIATES
ENGINEERS-PLANNERS

Sh 2 of 2

EXHIBIT 4 - APPENDIX B

EXHIBIT 4 - APPENDIX C

BOOK 389 PAGE 349

PAGE 1669

THIS DEED, made and entered into this 28th day of April, 1976, by and between HICKOK CONSTRUCTION CORPORATION, a Virginia corporation, GRANTOR and BRAGG HILL COMMUNITY CORPORATION, GRANTEE.

Marcus Hicks Baker 3.5 Checks Fee 5-27-76

WITNESSETH: That for $10.00 and other valuable consideration paid by the Grantee to the Grantor, receipt of which is hereby acknowledged, the Grantor hereby bargains, sells, grants and conveys with General Warranty and with English covenants of title unto the Grantee, Bragg Hill Community Corporation, in fee simple, the following described real estate, to-wit:

> All that certain tract or parcel of land which comprises the Common Area in Section Six (6) of the subdivision of Bragg Hill as duly dedicated, platted and recorded among the land records of the Circuit Court of Spotsylvania County, Virginia as shown on plat of Elliott & Associates, dated October 1972, and recorded in the Clerk's Office of the Circuit Court of Spotsylvania County, Virginia in Plat Book 10, Pages 73 and 74, and being all the property designated as 6.2500 acres as shown on plat of Elliott & Associates, dated October 1972 and recorded in the aforesaid Clerk's Office in Deed Book 312, Page 469.
>
> LESS AND EXCEPT: Lots 1 thru 50, inclusive, Section Six (6), Bragg Hill Subdivision, as shown on the first plat mentioned above and LESS AND EXCEPT those 60-foot rights-of-way across said property dedicated to public street purposes, also shown on said plat.
>
> This conveyance is made subject to the temporary turn circle easements shown on said subdivision plat.

WITNESS the following signature and seal:

HICKOK CONSTRUCTION CORPORATION

BY: Eugene W. Hickok (SEAL)
President

HICKOK CONSTRUCTION CORPORATION CORPORATE SEAL 1988 VIRGINIA

STATE OF VIRGINIA

CITY OF RICHMOND, to-wit:

The foregoing instrument was acknowledged before me this 29 day of April, 1976, by Eugene W. Hickok, President.

My commission expires: My Commission Expires February 6, 1979

Shirley C. Proctor
NOTARY PUBLIC

SHIRLEY C. PROCTOR NOTARY PUBLIC

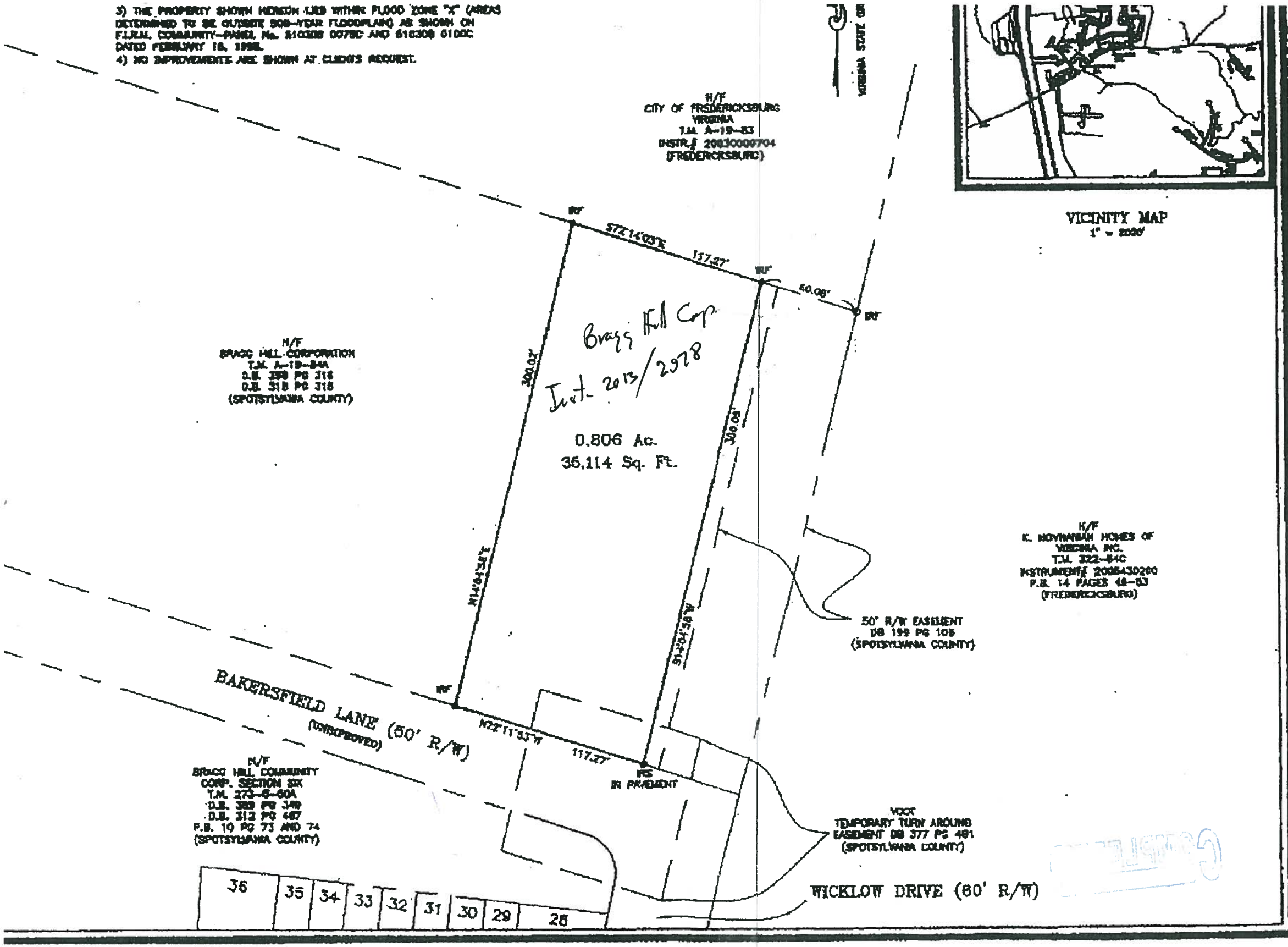
HICKS AND BAKER
ATTORNEYS AT LAW
FREDERICKSBURG, VA.

SPOTSYLVANIA COUNTY CIRCUIT COURT CLERK'S OFFICE, VIRGINIA May 5, 1976, This Deed was this day received in this office together with the certificate thereon admitted to record at 8:30 o'clock. AM.

Teste: Marguerite M. Cooke, Clerk.

State Tax 7.50
County Tax .50
Transfer 1.00
Recording 3.00
Add. Tax 1.00
Total 13.00

3) THE PROPERTY SHOWN HEREON LIES WITHIN FLOOD ZONE "X" (AREAS DETERMINED TO BE OUTSIDE 500-YEAR FLOODPLAIN) AS SHOWN ON F.I.R.M. COMMUNITY-PANEL No. 510308 0078C AND 510308 0100C DATED FEBRUARY 18, 1998.
4) NO IMPROVEMENTS ARE SHOWN AT CLIENTS REQUEST.



VICINITY MAP
1" = 2000'

BCA

FLAT OF SURVEY

SHOWING 0.806 ACRES IN TRS
NAME OF BRAGG HILL
COMMUNITY CORPORATION
VIRGINIA
CITY OF FREDERICKSBURG

DATE	OCT. 22, 2009
SCALE	1"=40'
DESIGNED BY:	
DRAWN BY:	JF
CHECKED BY:	MG
FILE NAME:	2009-3-FP
JOB NO.	2009-3
PLAN NO.	

1 OF 1

EXHIBIT 4 - APPENDIX D

Instrument Control Number

EXHIBIT 4 - APPENDIX E

Commonwealth of Virginia
Land Record Instruments
Cover Sheet - Form A

[ILS VLR Cover Sheet Agent 1.0.66]

INSTRUMENT #130002978
RECORDED IN THE CLERK'S OFFICE OF
FREDERICKSBURG CITY ON
NOVEMBER 1, 2013 AT 01:15PM
$115.00 GRANTOR TAX WAS PAID AS
REQUIRED BY SEC 58.1-802 OF THE VA. CODE
STATE: $57.50 LOCAL: $57.50

JEFFREY S. SMALL, CLERK
RECORDED BY: JLS

(Box for Deed Stamp Only)

TAX EXEMPT [ ] CORP [ ]

Date of Instrument: [11/1/2013]
Instrument Type: [DBS]

Number of Parcels [1]
Number of Pages [3]

City [x] County [ ] [City Of Fredericksburg]

First and Second Grantors

Last Name	First Name	Middle Name or Initial	Suffix
[BRAGG HILL COMMUN]	[ ]	[ ]	[ ]
[ ]	[ ]	[ ]	[ ]

First and Second Grantees

Last Name	First Name	Middle Name or Initial	Suffix
[BRAGG HILL CORPO]	[ ]	[ ]	[ ]
[ ]	[ ]	[ ]	[ ]

Grantee Address (Name) [BRAGG HILL CORPORATION]
(Address 1) [1206 WASHINGTON AVE]
(Address 2) [ ]
(City, State, Zip) [FRED] [VA] [22401]

Consideration [115,000.00] Existing Debt [0.00] Assumption Balance [0.00]

Prior Instr. Recorded at: City [ ] County [ ] [ ] Percent. in this Juris. [100]
Book [ ] Page [ ] Instr. No [ ]
Parcel Identification No (PIN) [7860-90-9711]
Tax Map Num. (If different than PIN) [7860-90-9711]
Short Property Description [0.806 AC]
[ ]
Current Property Address (Address 1) [UNKNOWN]
(Address 2) [ ]
(City, State, Zip) [FRED] [VA] [22401]

Instrument Prepared by [M J BARRETT]
Recording Paid for by [M J BARRETT]
Return Recording to (Name) [M J BARRETT]
(Address 1) [816 WILLIAM ST]
(Address 2) [ ]
(City, State, Zip) [FRED] [VA] [22401]
Customer Case ID [13-1427] [239-13B] [ ]

EXHIBIT 4 - APPENDIX E

TITLE INSURANCE UNDERWRITER: FIDELITY NATIONAL TITLE INSURANCE COMPANY

Prepared by M. J. Barrett, Esq.
(Virginia State Bar #20674)
816 William St.
Fredericksburg, Virginia 22401

Return to Grantee
Grantee's Address:
1206 WASHINGTON AVENUE
FREDERICKSBURG, VA 22401

Consideration: $115,000.00
Assessed Value: $ 0.00

Tax Parcel # 7860-90-9711

THIS DEED, made and entered into this 31ST day of OCTOBER, 2013, by and between **BRAGG HILL COMMUNITY CORPORATION,** a Virginia non-stock corporation, GRANTOR; and **BRAGG HILL CORPORATION**, a Virginia corporation, GRANTEE.

WITNESSETH:

That for and in consideration of the sum of Ten Dollars ($10.00), cash in hand paid, and other valuable consideration, the receipt of which is hereby acknowledged, the Grantor does hereby bargain, sell, grant and convey unto the Grantee, with General Warranty and English covenants of Title, in fee simple, the following described real estate, to-wit:

> All that certain lot or parcel of land with all improvements thereon and all rights and privileges appurtenant thereto, lying and being in the City of Fredericksburg, Virginia (formerly Courtland Magisterial District of Spotsylvania County, Virginia), described as **containing 0.806 acre,** more or less, on that certain plat of survey dated October 22, 2008, entitled "Plat of Survey Showing 0.806 Acres in the Name of Bragg Hill Community Corporation," prepared by Mark D. Goodpasture, L.S., of Bagby, Caldwell and Associates, Inc., a copy of which plat is attached hereto as **Exhibit A.**
>
> Being a portion of the 6.25 acres conveyed to Bragg Hill Community Corporation by deed dated April 28, 1976, from Hickok Construction Corporation, which deed is recorded among the land records of the Clerk's Office of the Circuit Court of Spotsylvania County, Virginia, in Deed Book 389, at Page 349.

MICHAEL J. BARRETT
ATTORNEY AT LAW
816 WILLIAM STREET
FREDERICKSBURG, VA 22401
(540) 371-2444

EXHIBIT 4 - APPENDIX E

This conveyance is made subject to all easements, restrictions and reservations of record validly affecting the property conveyed herein.

WITNESS the following signature(s) and seal(s):

BRAGG HILL COMMUNITY CORPORATION

By: _____(SEAL)
JOHN RICE, President

STATE OF VIRGINIA

CITY/COUNTY OF FREDERICKSBURG, to-wit:

The foregoing Deed was acknowledged before me this 31ST day of OCTOBER, 2013, by JOHN RICE, who is the President of BRAGG HILL COMMUNITY CORPORATION.

My commission expires: DECEMBER 31, 2014

_____
Notary Public
Printed Name: RHONDA J. EDWARDS

Va. Notary Registration No. 170730

RHONDA J. EDWARDS
COMMONWEALTH OF VIRGINIA
REGISTRATION NO. 170730
MY COMM. EXPIRES
NOTARY PUBLIC

MICHAEL J. BARRETT
ATTORNEY AT LAW
816 WILLIAM STREET
FREDERICKSBURG, VA 22401
(540) 371-2444

EXHIBIT 4 - APPENDIX E

EXHIBIT 4 - APPENDIX E

INSTRUMENT #130002978
RECORDED IN THE CLERK'S OFFICE OF
FREDERICKSBURG CITY ON
NOVEMBER 1, 2013 AT 01:15PM
$115.00 GRANTOR TAX WAS PAID AS
REQUIRED BY SEC 58.1-802 OF THE VA. CODE
STATE: $57.50 LOCAL: $57.50

JEFFREY S. SMALL, CLERK
RECORDED BY: JLS

EXHIBIT 4 - APPENDIX F

ID	Field1	Field2	Field3	Field4	Field5	Field6	Field7	Field10	Field8
85	81.	145	7769-99-1149	Hughey Ct.	BMJ Trust		1768 Bristol Mine Rd.	Colonial Beach, VA	22443	Residential
649	644.	1010	7779-07-8734	Jami's Pl.	Bradford & Victoria Ellis		1010 Jami's Pl.	Fredericksburg, VA	22401	Residential
128	124.	718	7769-99-5857	Denton Cir.	Bradley & Lucy Brown		2 Fairfield Cir.	Fredericksburg, VA	22407	Residential
89	85.	115	7769-99-2203	Hughey Ct.	Bradley & Lucy Brown		2 Fairfield Cir.	Fredericksburg, VA	22407	Residential
608	603.	1109	7779-04-6526	Great Oaks Ln.	Bradley & Trinette Steigleder		1109 Great Oaks Ln.	Fredericksburg, VA	22401	Residential
54	50.		7769-99-0343	None	Bragg Hill Community Corp.		P.O. Box 7266	Fredericksburg, VA	22404	Green space
109	105.		7769-99-7765	None	Bragg Hill Community Corp.		P.O. Box 7266	Fredericksburg, VA	22404	Residential
189	185.		7779-09-1846	None	Bragg Hill Community Corporation		P.O. Box 7266	Fredericksburg, VA	22404	Vacant land
275	271.		7870-00-2360	None	Bragg Hill Community Corporation		P.O. Box 7266	Fredericksburg, VA	22404	Vacant land
173	169.		7769-99-4595	None	Bragg Hill Community Corporation		P. O. Box 7266	Fredericksburg, VA	22404	Vacant land
326	322.		7860-90-9711	None	Bragg Hill Community Corporation		P.O. Box 7266	Fredericksburg, VA	22404	Vacant land
30	27.		7860-90-3994	None	Bragg Hill Corporation	c/o M.F. Glazebrook	1236 Jeff Davis Hwy.	Fredericksburg, VA	22401	Vacant land
601	596.	1002	7779-14-2381	Hickory Ct.	Brenda Bradshaw		1002 Hickory Ct.	Fredericksburg, VA	22401	Residential
385	381.		7779-33-3632	None	Brenda Hines		138 Woodland Rd.	Fredericksburg, VA	22401	Vacant land
384	380.	138	7779-33-2655	Woodland Rd.	Brenda Hines		138 Woodland Rd.	Fredericksburg, VA	22401	Residential
373	369.	115	7779-33-0525	Woodland Rd.	Brian & Mary Miller		115 Woodland Rd.	Fredericksburg, VA	22401	Residential
663	658.	1303	7779-06-8900	Preserve Ln.	Brian Gudmundsson		1303 Preserve Ln.	Fredericksburg, VA	22401	Residential
642	637.	1013	7779-07-9904	Jami's Pl.	Brian Medved		1013 Jami's Pl.	Fredericksburg, VA	22401	Residential
448	444.	11	7769-90-9870	Seneca Ter.	Bryan & Joann Josemans		11 Seneca Ter.	Fredericksburg, VA	22401	Residential
447	443.	13	7769-90-8798	Seneca Ter.	Bryan Metts	Gail Dove	6230 Overlook Dr.	King George, VA	22485	Residential
284	280.	416	7870-00-1371	Rann Ct.	Bryan Stelmok		P.O. Box 3186	Fredericksburg, VA	22402	Residential
323	319.	405	7860-90-9493	Rann Ct.	Bryan Stelmok		P.O. Box 3186	Fredericksburg, VA	22402	Residential
280	276.	408	7870-00-0380	Rann Ct.	Bryan Stelmok		P.O. Box 3186	Fredericksburg, VA	22402	Residential
322	318.	407	7870-00-0413	Rann Ct.	Bryan Stelmok		1413 Prince Edward St.	Fredericksburg, VA	22401	Residential
17	14.		7870-20-6853	None	Butler Franklin	Ingleside Apts. #630	3050 Military Rd., NW	Washington, DC	20015	Vacant land
257	253.	327	7870-00-1135	Brock Sq.	Candlelight Homes, LLC		11207 Ascot Ct.	Fredericksburg, VA	22407	Residential
668	663.	1002	7779-06-4779	Jon's Pl.	Carilto & Mariel Flores		1002 Jon's Pl.	Fredericksburg, VA	22401	Residential
393	389.	1803	7779-34-6135	Genther Ln.	Carl & Beryl Henne		1803 Genther Ln.	Fredericksburg, VA	22401	Residential
51	47.		7769-77-8378	None	Carol Coleman, Bonnie Carter	Gloria Whittaker	30 Briscoe Ln.	Fredericksburg, VA	22401	Vacant land
48	44.	44	7769-87-3295	Briscoe Ln.	Carol Coleman, Bonnie Carter	Gloria Whittaker	30 Briscoe Ln.	Fredericksburg, VA	22401	Residential
440	436.	18	7769-90-7507	Seneca Ter.	Carolee Harlin		18 Seneca Ter.	Fredericksburg, VA	22401	Residential
269	265.	241	7870-00-1221	Ivanhoe Ct.	Carolyn Gregg		9527 Burning Branch Rd.	Burke, VA	22015	Residential

EXHIBIT 4 - APPENDIX G

HIRSCHLER FLEISCHER
ATTORNEYS AT LAW

Charles W. Payne, Jr. • Fredericksburg Office
540.604.2108 • cpayne@hf-law.com
www.hf-law.com

April 1, 2014

BY HAND

Mr. Charles R. Johnston
Director of Community Planning
& Building Department
City of Fredericksburg
715 Princess Anne St., Room 209
PO Box 7447
Fredericksburg VA, 22404

Re: Downtown Properties, Inc.
Rezoning Application – Embrey Hills

Dear Chuck:

I hope this finds you well. Please find enclosed a fully executed Voluntary Proffer Statement for the above-referenced matter. Feel free to contact me with any questions and/or comments.

Respectfully,

Charles W. Payne, Jr.

5631652-1 039718.00001

The Edgeworth Building
2100 East Cary Street
Richmond, VA 23223
Phone: 804.771.9500
Fax: 804.644.0957

Mailing address:
Post Office Box 500
Richmond, VA 23218

Mill Race North
725 Jackson Street
Suite 200
Fredericksburg, VA 22401
Phone: 540.604.2100
Fax: 540.604.2101

EXHIBIT 4 - APPENDIX G

VOLUNTARY PROFFER STATEMENT

Applicant: Downtown Properties, Inc.

Project Name: Embrey Hills

Property: GPIN, 7860-90-3994, consisting of 34.055 acres GPIN, 7860-90-9711, consisting of 0.86 acres (part thereof), consisting of approximately 34.055 Acres

Rezoning Request: R-1, Residential to R-12, Residential

Case Number: _____

Date: February 24, 2014

OVERVIEW:

The undersigned hereby proffer that the use and development of the above referenced Property shall be in conformance with the following conditions. In the event the above-referenced rezoning, including the requested waivers and modifications, is not granted as applied for by the Applicant, then these proffers shall be withdrawn and be null and void. The headings of the proffers set forth below have been prepared for convenience or reference only and shall not control or affect the meaning or be taken as an interpretation of any provision of the proffers. Any improvements proffered herein below shall be provided at the time of development of the portion of the site adjacent to the improvement, unless otherwise specified. The terms "Applicant" and "Developer" shall include all future owners, assignees and successors in interest of the Property. Upon approval of this rezoning and these proffers, any and all prior proffers affecting the Property shall be null and void and of no further force and effect, and the proffers provided herein shall be in full force and effect.

References in this Proffer Statement to plans and exhibits shall include the following:

- General Development Plan, Sheets 1 – 10 prepared by Bagby Caldwell and Associates, P.C., dated December 16, 2013, as last revised and entitled "Embrey Hills GPIN 7860-90-3994 GPIN Application for Zoning Map Amendment" ("GDP").
- Photo Architectural Features Exhibit, attached hereto and marked as Exhibit A .

1. **LAND USE**

   A. The Property, consisting of approximately 34.055 Acres, shall be developed as R-12 Residential District, for single family attached uses (townhomes), all as generally depicted on the GDP.

B. The maximum number of townhomes will not exceed 99 units and will be generally located in the areas depicted on the GDP.

C. Development of the Property will be in general conformance with the GDP with respect to the approximate number and location of right-of-way entrances, building and parking configuration, setbacks from public rights-of-way, overall site coverage and preservation areas, subject to reasonable modifications as determined by the Applicant to be necessary due to final engineering, road alignment and design and/or stormwater management at the time of final site plan preparation for the project. For purposes of this Proffer Statement, the final approved city site plan shall supersede the GDP, except as otherwise provided hereunder.

D. The Out Parcel, as depicted on the GDP, and including approximately seven (7) acres, located on the western boundary of the Property, shall not be developed for residential purposes and the land use for this area shall be limited to recreational, community center, and institutional, or religious purposes nor shall there be vehicular access to this area from the development. However, nothing in this proffer shall be construed to prevent other recreational uses that are permitted in the portion of the property that is Chesapeake Bay Resource Protection Area, or in those areas outside of the Resource Protection Area, for recreational uses such as picnic areas and shelters, play equipment and nature studies and enhancements

2. TRANSPORTATION

A. Wicklow Drive Improvements. Applicant agrees to improve Wicklow Drive, including the widening of the existing pavement and to add curb, gutter and sidewalk improvements from the Ripken Park entrance to Fall Hill Avenue, all as generally shown on the GDP ("Wicklow Improvements"). Due to certain right of way constraints, the Wicklow Improvements will include certain construction modifications equivalent to one half section of City street standards. The aforesaid improvements shall be constructed prior to the issuance of the first townhouse certificate of occupancy permit located off of Ripken Drive.

B. Roffman Road Improvements. The Applicant agrees to construct, relocate and extend Roffman Road to the Property and further improve Roffman Road to Fall Hill Avenue, all as generally depicted on the GDP ("Roffman Improvements"). The Roffman Improvements include the widening and overlay of the existing pavement on Roffman Road, and the addition of curb, gutter and sidewalk improvements on both sides of Roffman Road, all as generally depicted on the GDP. Roffman Improvements shall be initially constructed, but not necessarily off bond, prior to issuance of the first occupancy permit on Camden Court.

C. Ripken Drive Dedication. The Applicant hereby agrees to construct and dedicate necessary right of way for the new proposed Ripken Drive (which replaces the prior Bakerfield Lane) which connects to Wicklow Drive and Camden Court, and extends within the Property, all as generally depicted on the GDP. Said right-of-way shall be

dedicated to the Fredericksburg City Council with the recordation of the final subdivision plat (as phased) of the lots on Ripken Drive.

D. **Camden Court Dedication**. The Applicant hereby agrees to construct and dedicate necessary right of way for the new proposed Camden Court, which connects to Ripken Drive and Roffman Road (as extended), and extends within the Property, all as generally depicted on the GDP. Said right-of-way shall be dedicated to the Fredericksburg City Council with the recordation of the final subdivision plat (as phased) of the lots on Camden Court.

3. FAÇADE TREATMENTS

A. To ensure quality in the construction of all townhouses, the facades of all townhouses (except openings in the building's façade, doors, windows, etc.) shall include the following:

1. Material on all townhouses will include brick, stone, stucco, vinyl or fiber cement siding, all in general accordance with attached Exhibit A .

2. All windows, doorways and building corners (on elevations with siding) will be finished with trim board.

3. The end unit of each townhouse building shall have full brick or natural stone front elevations.

B. Buildings shall have a pitched roof, with a minimum 3 to 12 pitch with asphalt shingles.

4. SITE DESIGN

A. All landscaping provided shall be in accordance with the Unified Development Ordinance.

B. Freestanding parking lot and street lighting shall consist of fixtures that are compatible with the architectural theme of buildings on the Property and shall have a maximum height of 24 feet. The location and spacing of lighting shall be determined at the time of final site plan review for each site to assure consistent light levels for security and energy efficiency.

5. ENVIRONMENT

A. The Applicant shall establish open space areas on the Property in substantial conformance with the GDP, subject to minor modifications required by preliminary or final site engineering. Said open space shall be shown on the Final Site Plan and shall consist of the preservation area, buffers, and like areas generally as depicted on the GDP and shall be in accordance with the applicable zoning requirements.

B. Site development shall comply with all requirements for Resource Protection Area, as generally depicted on the Plan. Such area shall be preserved in accordance with all applicable State and Federal regulations. The RPA shall be preserved in its natural state except for stream mitigation and preservation measures, utilities necessary for development of the Property or adjoining properties, road construction or existing utility easements, pedestrian trail access, and any temporary disturbance necessary for above activities approved in accordance with applicable State and Federal requirements.

6. WATER AND SEWER

Acceptance and approval of the zoning reclassification application by the Fredericksburg City Council shall authorize extension and construction of water and sewer lines, including any required wastewater pumping station, and facilities necessary to serve the Property pursuant to the Virginia Code Section 15.2-2232.

7. MISCELLANEOUS

A. Applicant, upon the approval of the owner of commercial property located along Fall Hill Avenue as GPIN # 7779-09-3723 aka "7-11" hereby agrees to make cosmetic improvements to the 7-11 property located at the corner of Fall Hill Avenue and Wicklow Drive, which improvement will include new fencing between the 7-11 and existing Bragg Hill townhomes and improved landscaping on said property, all in accordance with City requirements. Provided that the Applicant is granted a temporary sign license by the 7-11 owners, the City agrees to grant approval of a temporary sign permit for marketing townhomes within Embrey Hills. Said sign shall not exceed 4 feet by 8 feet and shall be removed by the applicant within 3 months of the last home sold in Embrey Hills.

B. To the extent not in violation with applicable fair housing laws, regulations and requirements, all townhouse units shall be marketed "for sale".

C. The Applicant, prior to developing the Property, shall encumber the Property with a declaration of conditions, covenants, restrictions, and easements for the purpose of (a) protecting the value and desirability of the Property; (b) facilitating the planning and development of the development in a unified and consistent manner; and (c) providing for the installation, maintenance, and repair for all landscaping, on-site amenities, open space, and other common areas. The Applicant will also create a property or homeowner's association as a non-stock corporation under the laws of Virginia that will provide and ensure oversight and structure for services provided, quality standards, intercampus relationships, and common area maintenance.

This Proffer Statement supersedes any proffer statement and proffers previously made or submitted in connection with this application and with this Property.

EXHIBIT 4 - APPENDIX G

WITNESS the following agreement and acknowledgement of this proffer statement:

Applicant/Contract Purchaser
Downtown Properties, Inc., a Virginia Corporation

By: _____
Douglas F. Brown
President

COMMONWEALTH OF VIRGINIA,
CITY OF FREDERICKSBURG, to wit:

I, the undersigned, a Notary Public in and for the jurisdiction aforesaid, do hereby certify that Douglas F. Brown, in his capacity as President of Downtown Properties, Inc., has personally acknowledged the same before me in my aforesaid jurisdiction.

GIVEN under my hand and seal this 27th day of March 2014.

_____
Notary Public

Print Name: Joanne Hughes
My Commission Expires: 8/31/2014
Registration No.: 7037936
[SEAL]

JOANNE HUGHES
NOTARY PUBLIC
REG # 7037936
MY COMMISSION EXPIRES 08/31/2014
COMMONWEALTH OF VIRGINIA

EXHIBIT 4 - APPENDIX G

Owner
Bragg Hill Corporation,
a Virginia Corporation

By: _____
Print Name: MIKE DEGEN
Title: Owner

COMMONWEALTH OF VIRGINIA,
CITY OF FREDERICKSBURG, to wit:

I, the undersigned, a Notary Public in and for the jurisdiction aforesaid, do hereby certify that Mike Degen, in his capacity as Owner of Bragg Hill Corporation, has personally acknowledged the same before me in my aforesaid jurisdiction.

GIVEN under my hand and seal this 31st day of March 2014.

Betty J. Miller
Notary Public

Print Name: Betty J. MILLER
My Commission Expires: 8/31/2014
Registration No.: 4060695
[SEAL]

BETTY J. MILLER
NOTARY PUBLIC
REG # 4060695
MY COMMISSION EXPIRES 8/31/2014
COMMONWEALTH OF VIRGINIA

EXHIBIT 4 - APPENDIX G

EXHIBIT A

General Architectural Features

5621758-1 039718.00001

EXHIBIT 4 - APPENDIX G

EXHIBIT

A

EMBREY HILLS

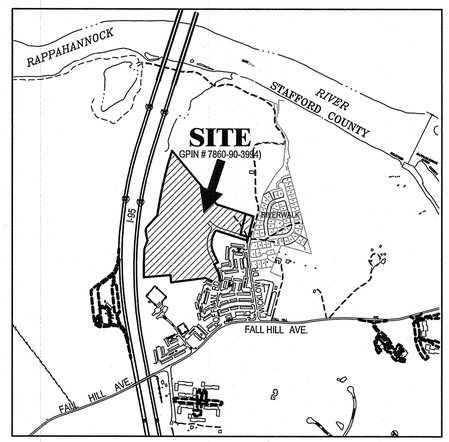
G.P.I.N. # 7860-90-3994

APPLICATION FOR ZONING MAP AMENDMENT

SITE STATISTICS

EXISTING ZONING:	R-1 (PROPOSED R-2 PER CITY INITIATED MAP AMENDMENTS)
SITE AREA:	
G.P.I.N. # 7860-90-3994	34.055 ACRES
OUT PARCEL:	7.00 ACRES (PER PROFFER 1.D)
REMAINING AREA:	27.055 ACRES (PER PROFFER 1.D)
STEEP SLOPES:	
AREA IN STEEP SLOPES:	7.66 ACRES
% AREA IN STEEP SLOPES:	22.49% (7.66 AC/34.055 AC)
% ALLOWABLE DENSITY IN STEEP SLOPES:	75%
ZONING DISTRICT COMPARISONS:	
EXISTING ZONING:	R-1/R-2 (RESIDENTIAL DISTRICT)
ALLOWABLE RESIDENTIAL DENSITY:	2 UNITS/ACRE
ALLOWABLE DENSITY CALCULATION:	
LOTS = [2 X (33.962 AC. – 7.66 AC)] + [2 X (7.66 AC X .75)]	= 64 LOTS
TRAFFIC GENERATION:	
64 SINGLE FAMILY DWELLINGS @ 10 VTE/LOT	= 640 VTE
SUGGESTED ZONING PER COMPREHENSIVE PLAN:	PDR (PLANNED DEVELOPMENT–RESIDENTIAL DISTRICTS)
ALLOWABLE RESIDENTIAL DENSITY:	6 UNITS/ACRE
ALLOWABLE DENSITY CALCULATION:	
LOTS = [6 X (33.962 AC. – 7.66 AC)] + [6 X (7.66 AC X .75)]	= 192 LOTS
TRAFFIC GENERATION:	
32 SINGLE FAMILY DWELLINGS @ 10 VTE/LOT	= 320 VTE
160 TOWNHOUSE DWELLINGS @ 6 VTE/LOT	= 960 VTE
TOTAL VTE	=1280 VTE
PROPOSED ZONING MAP AMENDMENT:	
PROPOSED ZONING:	R-12 (RESIDENTIAL DISTRICT)
ALLOWABLE RESIDENTIAL DENSITY:	12 UNITS/ACRE
ALLOWABLE DENSITY CALCULATION:	
LOTS = [12 X (33.962 AC. – 7.66 AC)] + [12 X (7.66 AC X .75)]	= 384 LOTS
PROPOSED NUMBER OF LOTS:	99 LOTS
TRAFFIC GENERATION:	
99 TOWNHOUSE DWELLINGS @ 6 VTE/LOT	594 VTE
PROPOSED PHASING:	
PHASE I:	20 LOTS
PHASE II:	28 LOTS
PHASE III:	51 LOTS
TOTAL:	99 LOTS
PROPOSED DENSITY:	
DENSITY AT 34.055 ACRES:	2.91 UNITS PER ACRE (99 LOTS/34.055 ACRES)
DENSITY AT 27.055 ACRES:	3.65 UNITS PER ACRES (99 LOTS/27.055 ACRES)
IMPERVIOUS AREA:	
BUILDING FOOTPRINT:	86,080 SF (1.976 ACRES)
SIDEWALKS AND DRIVEWAYS:	47,159 SF (1.082 ACRES)
PARKING AREAS AND TRAVELWAYS:	184,590 SF (4.237 ACRES)
TOTAL:	317,829 SF (7.296 ACRES)
OPEN SPACE:	
REQUIRED OPEN SPACE:	25%
OPEN SPACE PROVIDED AT 34.055 ACRES:	34.055 ACRES – 7.296 ACRES = 26.759 ACRES
OPEN SPACE RATIO AT 34.055 ACRES:	26.759 ACRES/34.055 ACRES X 100 = 78.5%
OPEN SPACE PROVIDED AT 27.055 ACRES:	26.055 ACRES – 7.296 ACRES = 18.759 ACRES
OPEN SPACE RATIO AT 27.055 ACRES:	18.759 ACRES/27.055 ACRES X 100 = 69.3%
PARKING SPACES:	
REQUIRED PARKING SPACES:	1.5 PER DU + 1 PER EVERY 5 UNITS = 169 SPACES
PARKING SPACES PROVIDED:	
DRIVEWAY SPACES:	51 SPACES
PARKING SPACES:	175 SPACES
ON STREET PARKING SPACES:	47 SPACES
TOTAL:	273 SPACES
BUILDING HEIGHT:	
ALLOWED:	50'
PROPOSED:	48'

CITY OF FREDERICKSBURG



VICINITY MAP

1" = 1000'

INDEX

SHEET NO.	TITLE
1	TITLE SHEET
2	PLAT OF SUBDIVISION
3	EXISTING CONDITIONS PLAN (1)
4	EXISTING CONDITIONS PLAN (2)
5	GENERALIZED DEVELOPMENT PLAN
6	GDP – UTILITIES
7	GDP – STORMWATER MANAGEMENT
8	GDP – LIGHTING AND LANDSCAPING
9	WICKLOW DRIVE IMPROVEMENTS
10	ROFFMAN ROAD IMPROVEMENTS

OWNER

BRAGG HILL CORPORATION
C/O MIKE DEGEN, MEMBER
P.O. BOX 7103
FREDERICKSBURG, VIRGINIA 22404
PHONE: 540-809-3400
MDDSS@AOL.COM

APPLICANT

DOWNTOWN PROPERTIES
C/O DOUGLAS F. BROWN
5 FRANTZ COURT
FREDERICKSBURG, VIRGINIA 22405
PHONE: 540-760-6707
dfbrown@cox.net

FLOOD PLAIN

THE PROPERTY SHOWN HEREON LIES WITHIN FLOOD ZONE "X" (AREAS DETERMINED TO BE OUTSIDE OF 500 YEAR FLOOD PLAIN) AS INDICATED ON FIRM COMMUNITY PANEL 510065009C & 5100650028C, DATED SEPTEMBER 19, 2007.

CITY OF FREDERICKSBURG, VIRGINIA

REVISIONS

DATE

BCA
BAGBY, CALDWELL and ASSOCIATES, P.C.
CIVIL ENGINEERS AND LAND SURVEYORS
1985 JEFFERSON DAVIS HIGHWAY
FREDERICKSBURG, VIRGINIA 22401
TELEPHONE: (540) 373-5178
FAX: (540) 373-6281

COMMONWEALTH OF VIRGINIA
MICHAEL M. BAGBY
Lic. No. 11765
PROFESSIONAL ENGINEER

TITLE SHEET

EMBREY HILLS
G.P.I.N. # 7860-90-3994
APPLICATION FOR ZONING MAP AMMENDMENT

FREDERICKSBURG VIRGINIA

DATE:	12-16-13
SCALE:	
DESIGNED BY:	MMB
DRAWN BY:	LT
CHECKED BY:	MMB
FILE NAME:	JN-COVERSHEET
JOB NO.	20471-2
PLAN NO.	

ADJACENT PROPERTIES OWNERS (TO BE NOTIFIED OF PUBLIC HEARING)

BRAGG HILL/CENTRAL PARK TOWNHOMES (ZONED R-1)
PROPOSED REZONING TO R-12 BY CITY OF FREDERICKSBURG

BRAGG HILL CORPORATION
SECTION SIX
INSTR# 20132978
GPIN# 7860-90-9711
T.M. 273-5-50A

BRAGG HILL COMMUNITY CORP.
COMMON AREA BLOCK 273-5
T.M. 273-5-A
GPIN# 7870-00-2360

BRAGG HILL COMMUNITY CORP.
SECTION FOUR
GREEN SPACE
T.M. 273-2-A
INSTR# 20122030
GPIN# 7860-90-9442

LOT 50
ROSSTEK PROPERTIES LLC
INSTR# 20122030
GPIN# 7860-90-9442

LOT 1
3337 LLC
INSTR# 2013432
GPIN# 7860-90-9299

LOT 63
RAMIREZ EUDUARDOA
& MILAGRO DEL
INSTR# 20054447
GPIN# 7870-00-0202

LOT 62
COOPER ROBERT M SR
GPIN# 7870-00-0107

LOT 61
JANSEN KAREN MARIE
INSTR# 20082046
GPIN# 7860-90-9195

LOT 60
COOPER ROBERT M SR
GPIN# 7860-90-9193

LOT 59
COOPER ROBERT M SR
GPIN# 7860-90-9191

LOT 58
BONES-GONZALES ALICE
INSTR# 2006466
GPIN# 7860-90-9088

LOT 33
SUNRISE PROPERTIES LLC
DB 329, PG. 602
GPIN# 7860-90-8183

LOT 32
SUNRISE PROPERTIES LLC
INSTR# 20092338
GPIN# 7860-90-8164

LOT 31
3337 LLC
INSTR# 2013424
GPIN# 7860-90-8144

LOT 30
ABADI PARISA & ABADI NASRI
INSTR# 20062616
GPIN# 7860-90-8125

LOT 29
JMHC HOLDING LLC
INSTR# 20121133
GPIN# 7860-90-8116

LOT 28
VALUE INVESTMENTS LLC
INSTR# 20102242
GPIN# 7860-90-7197

LOT 27
SANDHAR MAHESHINDER
INSTR# 20042149
GPIN# 7860-90-7178

LOT 26
MICAH ECUMENICAL MINISTRIES
INSTR# 2012739
GPIN# 7860-90-7158

LOT 25
ANDRUS DARHL
INSTR# 2004716
GPIN# 7860-90-7230

RIVER WALK (ZONED R-4)

LOT 1
LONG GREGORY
INSTR# 20111348
GPIN #7870-00-4400

LOT 8
PHILLIPS AUDREY L
INSTR# 2011975
GPIN #7870-00-3596

LOT 9
JOHNS GARRY M JR
INSTR# 20072276
GPIN #7870-00-4617

LOT 52
ARELLANO ARNEL
INSTR# 20122256
GPIN# 7870-01-5243

LOT 53
KORNEGAY MONTINEZ
& SHERREA
INSTR# 2009770
GPIN# 7870-01-5148

RIVERWALK HOME OWNERS ASSOCIATION
4090-A LAFAYETTE CENTER DR.
C/O HOVNANNAN HOMES OF VIRGINIA INC.
CHANTILLY, VA. 20151

LOT 54
BROWN DOMINQUS J & SHERRY D
INSTR# 200992
GPIN# 7870-01-5111

LOT 55
WIBLE SARAH ELIZABETH
& JOHN K
INSTR# 20092803
GPIN# 7870-01-4096

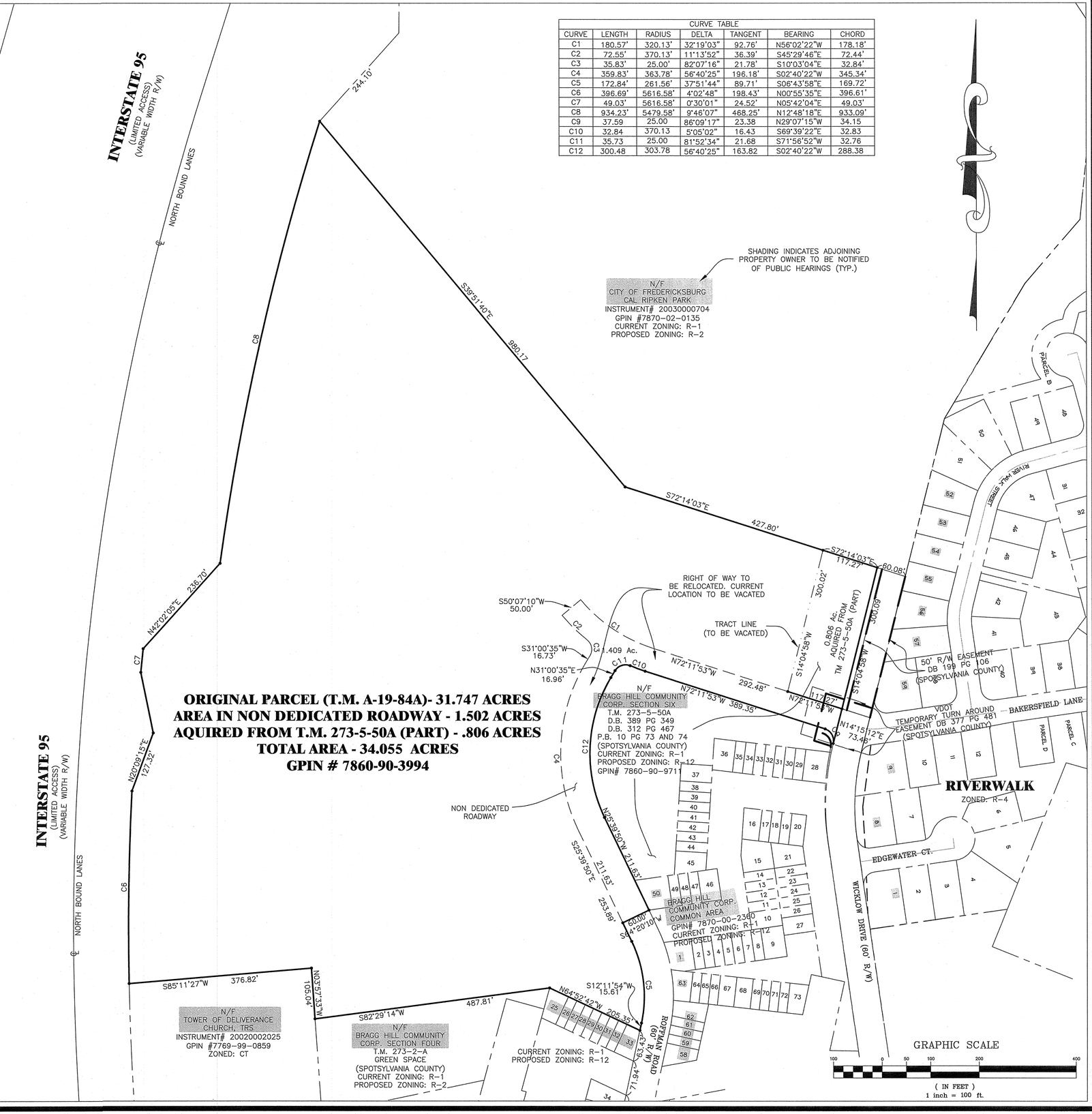
LOT 56
PRICE FAITH D
INSTR# 20092373
GPIN# 7870-01-4090

LOT 57
BOLUS KATHERINE A & ROBERT
INSTR# 20102701
GPIN# 7870-00-4973

LOT 59
GOLDEN JOHN JR
INSTR# 20081390
GPIN #7870-00-4834

TOWER OF DELIVERANCE
CHURCH, TRS
INSTR# 20020002025
GPIN# 7769-99-0859

CITY OF FREDERICKSBURG
CAL RIPKEN PARK
INSTRUMENT# 20030000704
GPIN #7870-02-0135



CURVE TABLE						
CURVE	LENGTH	RADIUS	DELTA	TANGENT	BEARING	CHORD
C1	180.57'	320.13'	32°19'03"	92.76'	N56°02'22"W	178.18'
C2	72.55'	370.13'	11°13'52"	36.39'	S45°29'46"E	72.44'
C3	35.83'	25.00'	82°07'16"	21.78'	S10°03'04"E	32.84'
C4	359.83'	363.78'	56°40'25"	196.18'	S02°40'22"W	345.34'
C5	172.84'	261.56'	37°51'44"	89.71'	S06°43'58"E	169.72'
C6	396.69'	5616.58'	4°02'48"	198.43'	N00°55'35"E	396.61'
C7	49.03'	5616.58'	0°30'01"	24.52'	N05°42'04"E	49.03'
C8	934.23'	5479.58'	9°46'07"	468.25'	N12°48'18"E	933.09'
C9	37.59	25.00	86°09'17"	23.38	N29°07'15"W	34.15
C10	32.84	370.13	5°05'02"	16.43	S69°39'22"E	32.83
C11	35.73	25.00	81°52'34"	21.68	S71°56'52"W	32.76
C12	300.48	303.78	56°40'25"	163.82	S02°40'22"W	288.38

REVISIONS	
DATE	

BAGBY, CALDWELL and ASSOCIATES, P.C.
CIVIL ENGINEERS AND LAND SURVEYORS
1985 JEFFERSON DAVIS HIGHWAY, SUITE 102
FREDERICKSBURG, VIRGINIA 22401
TELEPHONE: (540) 373-5178
FAX: (540) 373-6281

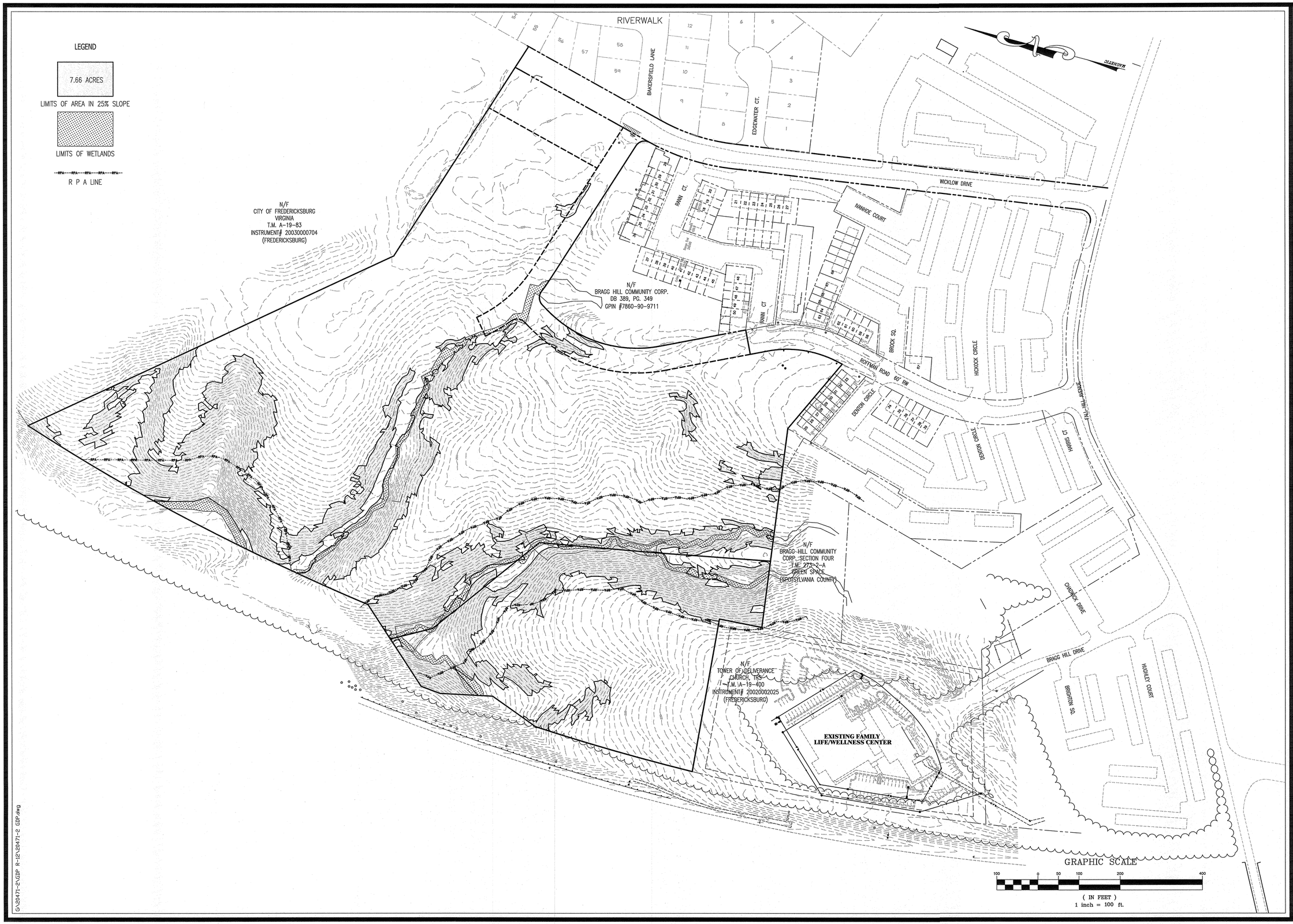
COMMONWEALTH OF VIRGINIA
DARRELL M. CALDWELL
LIC. NO. 1411
LAND SURVEYOR

PRELIMINARY PLAT

EMBREY HILLS
GPIN# 7860-90-3994
APPLICATION FOR ZONING MAP AMMENDMENT

CITY OF FREDERICKSBURG VIRGINIA

DATE:	2-27-14
SCALE:	1" = 100'
DESIGNED BY:	
DRAWN BY:	
CHECKED BY:	
FILE NAME:	20471-2PLAT
JOB NO.	20471-2
PLAN NO.	



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REVISIONS

DATE

BCA

BAGBY, CALDWELL and ASSOCIATES, P.C.
CIVIL ENGINEERS AND LAND SURVEYORS
1985 JEFFERSON DAVIS HIGHWAY
FREDERICKSBURG, VIRGINIA 22401
TELEPHONE: (540) 373-5178
FAX: (540) 373-6381

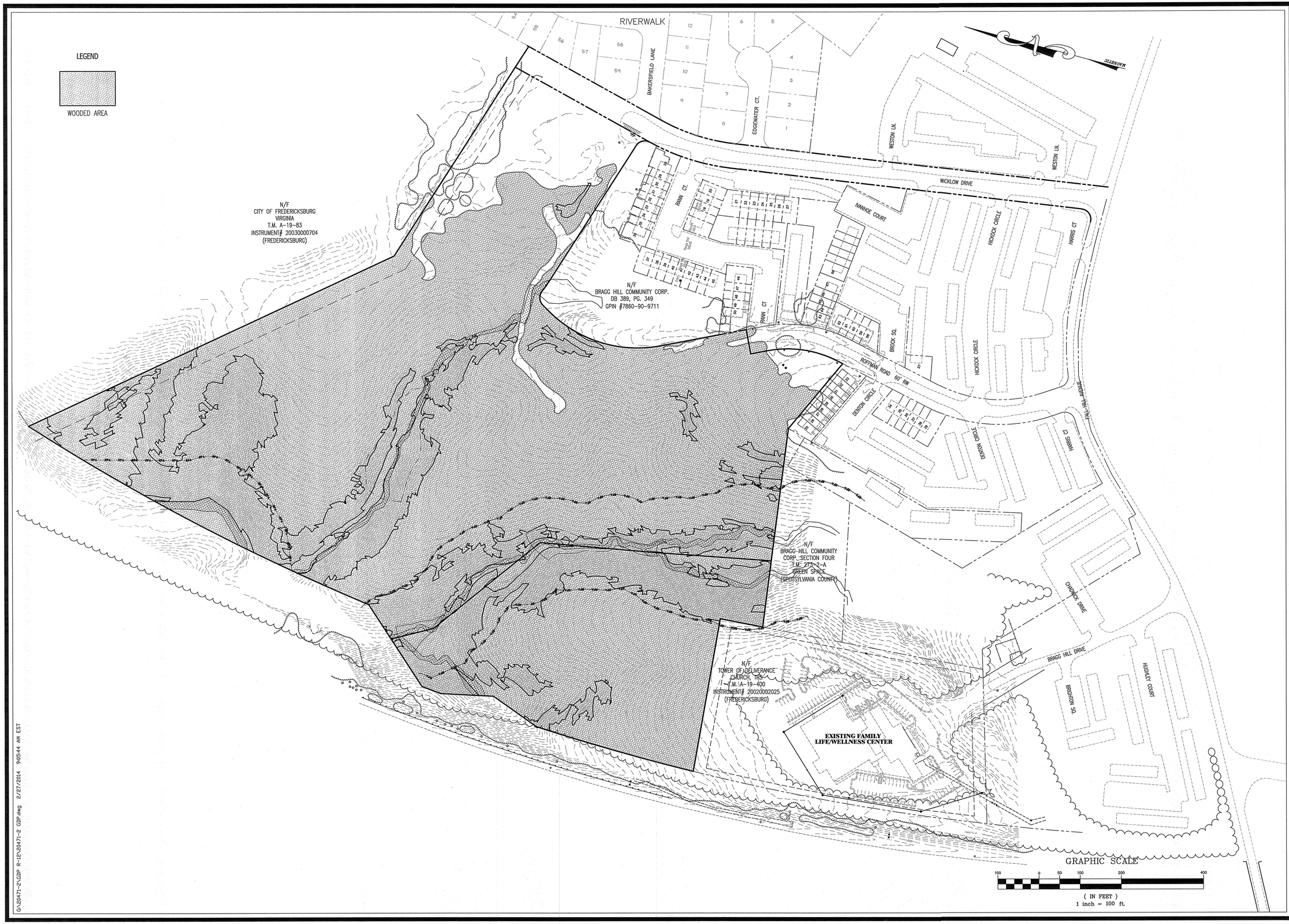
COMMONWEALTH OF VIRGINIA
MICHAEL M. BAGBY
Lic. No. 11765
PROFESSIONAL ENGINEER

EXISTING CONDITIONS (1)

EMBREY HILLS
GPIN# 7860-90-3994
APPLICATION FOR ZONING MAP AMMENDMENT

CITY OF FREDERICKSBURG VIRGINIA

DATE:	2-27-14
SCALE:	1" = 100'
DESIGNED BY:	
DRAWN BY:	LT
CHECKED BY:	
FILE NAME: 20471-2 R12LAYOUT	
JOB NO.	20471-2
PLAN NO.	



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REVISIONS	
DATE	

BCA
BAGBY, CALDWELL and ASSOCIATES, P.C.
CIVIL ENGINEERS AND LAND SURVEYORS
1985 JEFFERSON DAVIS HIGHWAY
FREDERICKSBURG, VIRGINIA 22401
TELEPHONE (540) 373-5178
FAX: (540) 373-6283

COMMONWEALTH OF VIRGINIA
MICHAEL M. BAGBY
Lic. No. 11765
PROFESSIONAL ENGINEER

EXISTING CONDITIONS (2)

EMBREY HILLS
GPIN# 7860-90-3994
APPLICATION FOR ZONING MAP AMMENDMENT

CITY OF FREDERICKSBURG VIRGINIA

DATE:	2-27-14
SCALE:	1" = 100'
DESIGNED BY:	
DRAWN BY:	LT
CHECKED BY:	
FILE NAME: 20471-2 R12LAYOUT	
JOB NO.	20471-2
PLAN NO.	

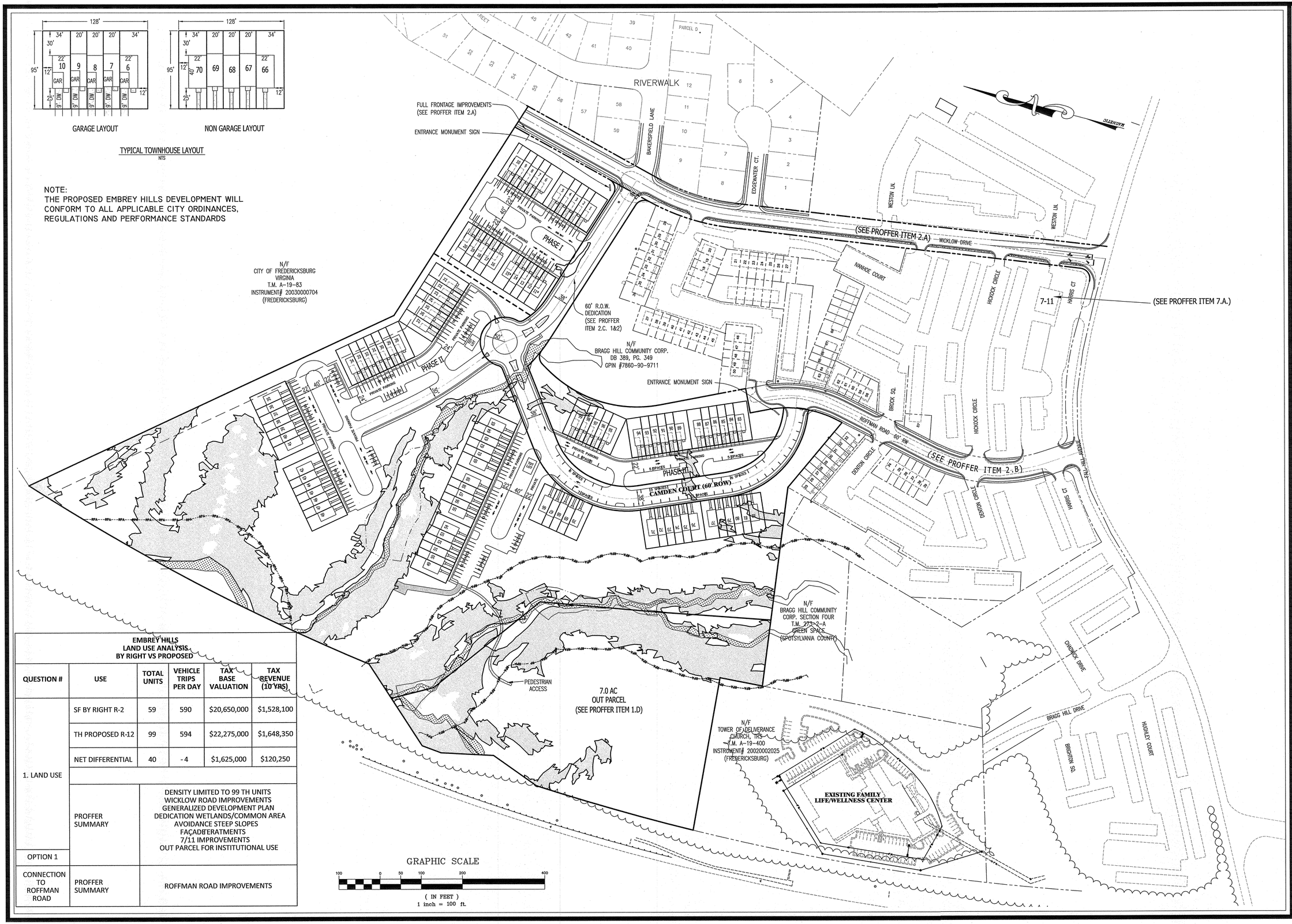
4

GARAGE LAYOUT

NON GARAGE LAYOUT

TYPICAL TOWNHOUSE LAYOUT
NTS

NOTE:
THE PROPOSED EMBREY HILLS DEVELOPMENT WILL CONFORM TO ALL APPLICABLE CITY ORDINANCES, REGULATIONS AND PERFORMANCE STANDARDS



EMBREY HILLS LAND USE ANALYSIS BY RIGHT VS PROPOSED					
QUESTION #	USE	TOTAL UNITS	VEHICLE TRIPS PER DAY	TAX BASE VALUATION	TAX REVENUE (10 YRS)
1. LAND USE	SF BY RIGHT R-2	59	590	$20,650,000	$1,528,100
	TH PROPOSED R-12	99	594	$22,275,000	$1,648,350
	NET DIFFERENTIAL	40	-4	$1,625,000	$120,250
	PROFFER SUMMARY	DENSITY LIMITED TO 99 TH UNITS WICKLOW ROAD IMPROVEMENTS GENERALIZED DEVELOPMENT PLAN DEDICATION WETLANDS/COMMON AREA AVOIDANCE STEEP SLOPES FAÇADE TREATMENTS 7/11 IMPROVEMENTS OUT PARCEL FOR INSTITUTIONAL USE			
OPTION 1					
CONNECTION TO ROFFMAN ROAD	PROFFER SUMMARY	ROFFMAN ROAD IMPROVEMENTS			

REVISIONS

DATE	

BCA
BAGBY, CALDWELL and ASSOCIATES, P.C.
CIVIL ENGINEERS AND LAND SURVEYORS
1985 JEFFERSON DAVIS HIGHWAY
FREDERICKSBURG, VIRGINIA 22401
TELEPHONE (540) 373-4178
FAX: (540) 373-6281

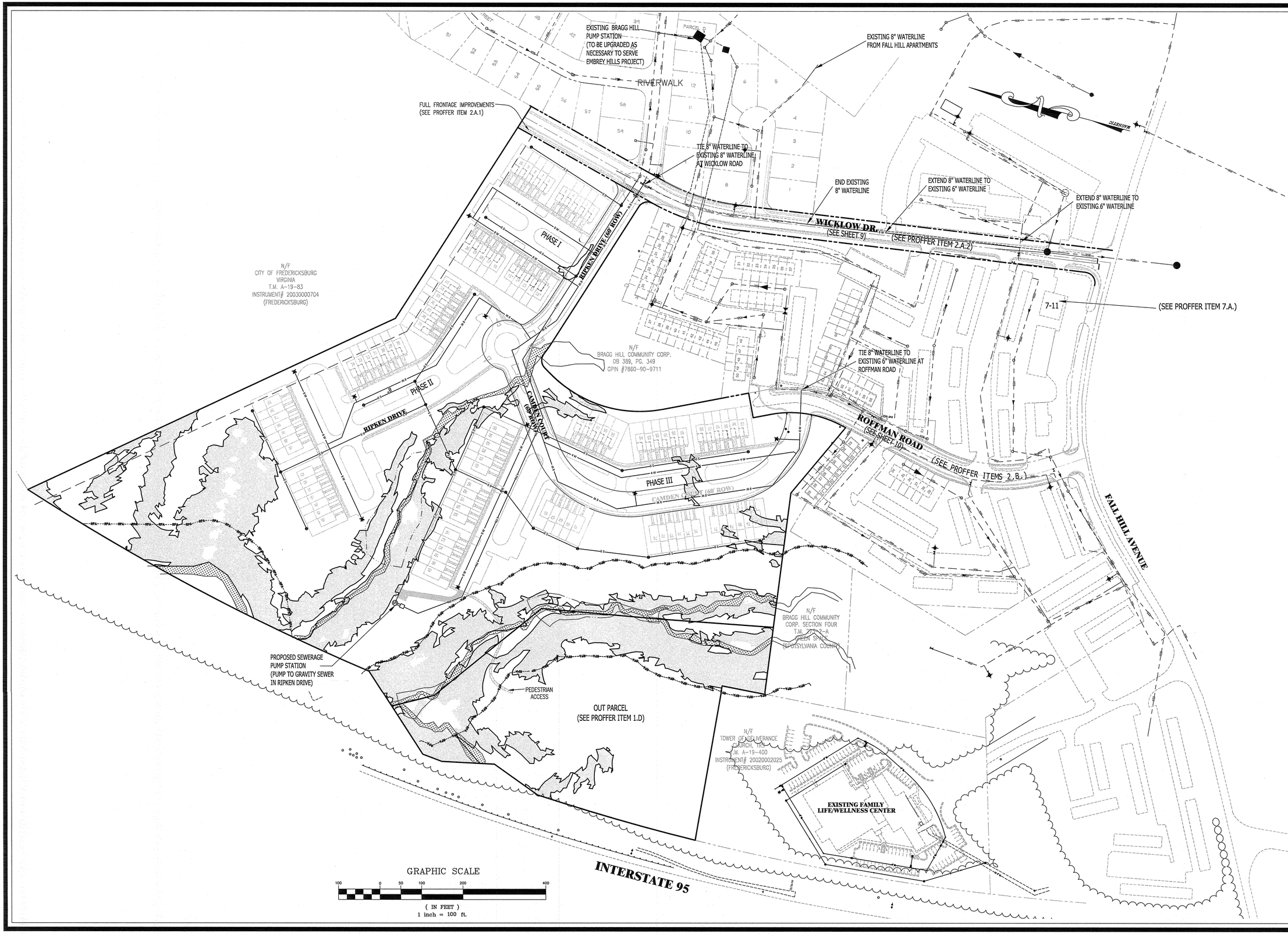
COMMONWEALTH OF VIRGINIA
MICHAEL M. BAGBY
Lic. No. 11765
PROFESSIONAL ENGINEER

GENERALIZED DEVELOPMENT PLAN

EMBREY HILLS
GPIN# 7860-90-3994
APPLICATION FOR ZONING MAP AMMENDMENT

CITY OF FREDERICKSBURG VIRGINIA

DATE:	2-27-14
SCALE:	1" = 100'
DESIGNED BY:	
DRAWN BY:	LT
CHECKED BY:	
FILE NAME: 20471-2 R12LAYOUT	
JOB NO.	20471-2
PLAN NO.	



REVISIONS	
DATE	

BAGBY, CALDWELL and ASSOCIATES, P.C.
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1985 JEFFERSON DAVIS HIGHWAY
FREDERICKSBURG, VIRGINIA 22401
TELEPHONE: (540) 371-1178
FAX: (540) 373-6281

COMMONWEALTH OF VIRGINIA
MICHAEL M. BAGBY
Lic. No. 11765
PROFESSIONAL ENGINEER

GDP - UTILITIES

EMBREY HILLS
GPIN# 7860-90-3994
APPLICATION FOR ZONING MAP AMMENDMENT

CITY OF FREDERICKSBURG VIRGINIA

DATE:	2-27-14
SCALE:	1" = 100'
DESIGNED BY:	
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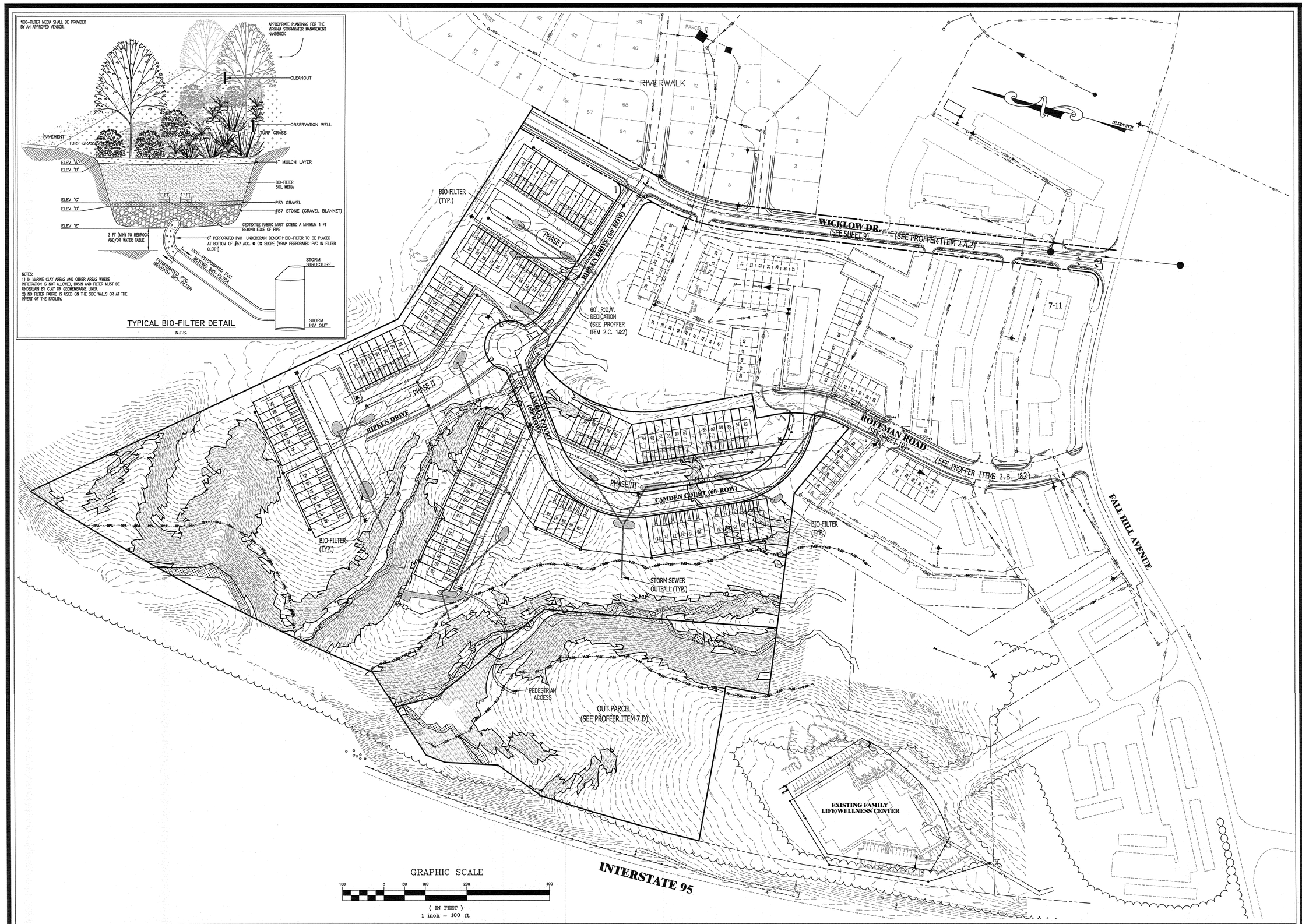

REVISIONS

DATE	

BAGBY, CALDWELL and ASSOCIATES, P.C.
CIVIL ENGINEERS AND LAND SURVEYORS
1985 JEFFERSON DAVIS HIGHWAY
FREDERICKSBURG, VIRGINIA 22401
TELEPHONE: (540) 373-5178
FAX: (540) 373-6281

COMMONWEALTH OF VIRGINIA
MICHAEL M. BAGBY
Lic. No. 11765
PROFESSIONAL ENGINEER

GDP - STORMWATER MANAGEMENT PLAN

EMBREY HILLS
GPIN# 7860-90-3994
APPLICATION FOR ZONING MAP AMMENDMENT

CITY OF FREDERICKSBURG VIRGINIA

DATE:	2-27-14
SCALE:	1" = 100'
DESIGNED BY:	
DRAWN BY:	LT
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FILE NAME: 20471-2 R12LAYOUT	
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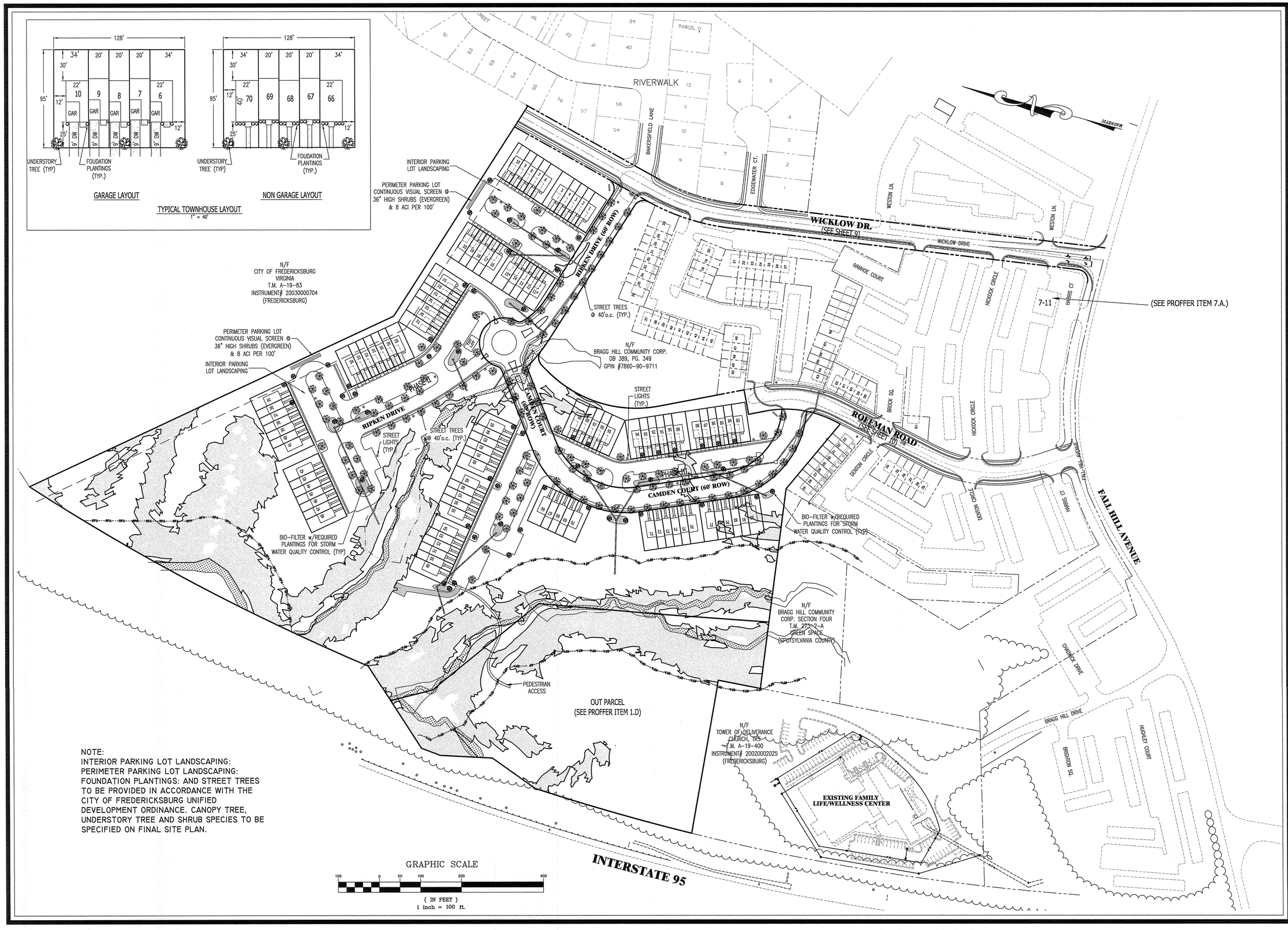
PLAN NO.	



NOTE:
INTERIOR PARKING LOT LANDSCAPING:
PERIMETER PARKING LOT LANDSCAPING:
FOUNDATION PLANTINGS: AND STREET TREES TO BE PROVIDED IN ACCORDANCE WITH THE CITY OF FREDERICKSBURG UNIFIED DEVELOPMENT ORDINANCE. CANOPY TREE, UNDERSTORY TREE AND SHRUB SPECIES TO BE SPECIFIED ON FINAL SITE PLAN.

REVISIONS	
DATE	

BAGBY, CALDWELL and ASSOCIATES, P.C.
CIVIL ENGINEERS AND LAND SURVEYORS
1985 JEFFERSON DAVIS HIGHWAY
FREDERICKSBURG, VIRGINIA 22401
TELEPHONE (540) 373-4478
FAX: (540) 373-6281

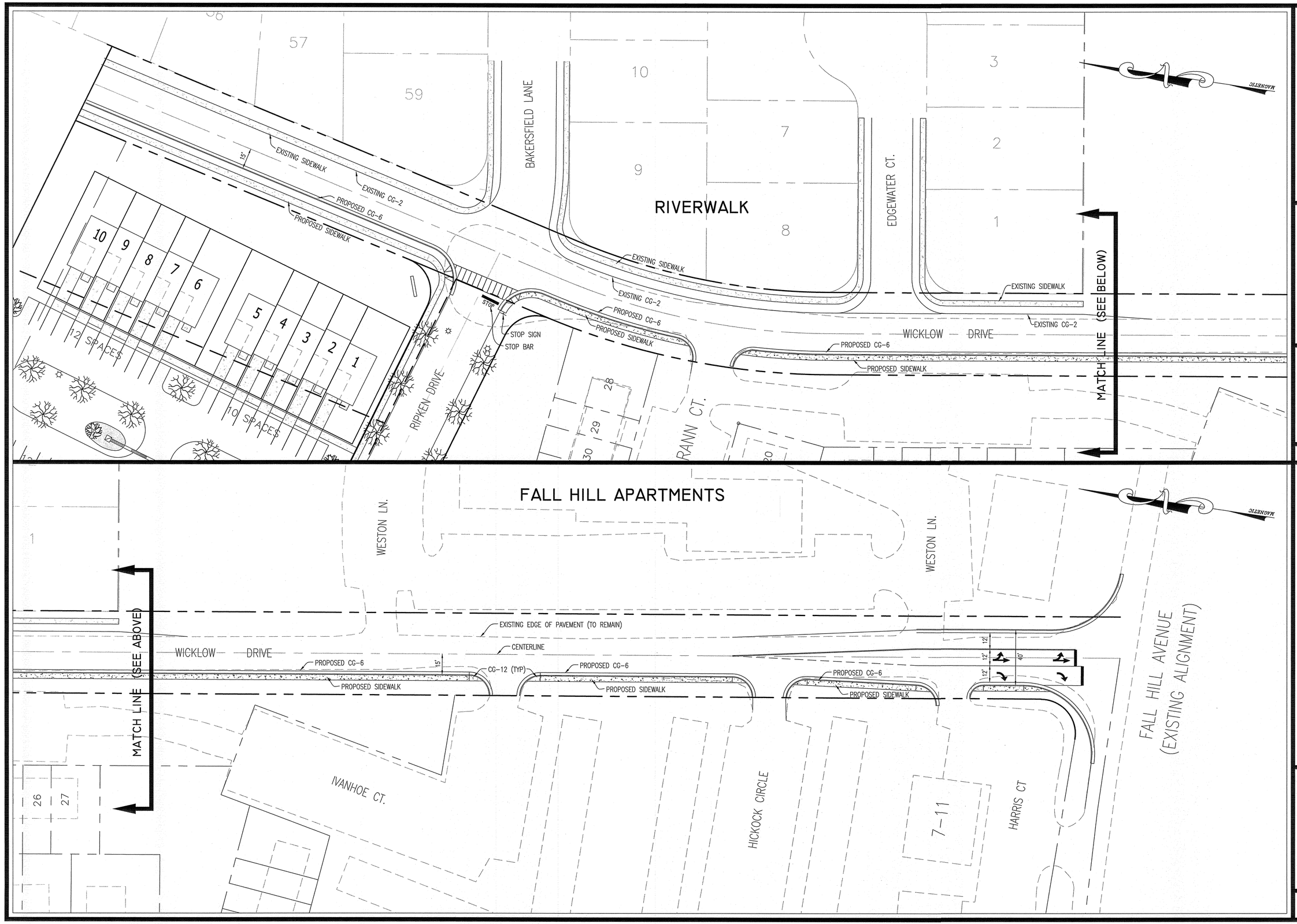
COMMONWEALTH OF VIRGINIA
MICHAEL M. BAGBY
Lic. No. 11765
PROFESSIONAL ENGINEER

GDP - LIGHTING AND LANDSCAPING

EMBREY HILLS
GPIN# 7860-90-3994
APPLICATION FOR ZONING MAP AMMENDMENT

CITY OF FREDERICKSBURG VIRGINIA

DATE:	2-27-14
SCALE:	1" = 100'
DESIGNED BY:	
DRAWN BY:	LT
CHECKED BY:	
FILE NAME: 20471-2 R12LAYOUT	
JOB NO.	20471-2
PLAN NO.	



REVISIONS

DATE

BCA

BAGBY, CALDWELL and ASSOCIATES, P.C.
CIVIL ENGINEERS AND LAND SURVEYORS
1905 JEFFERSON DAVIS HIGHWAY
FREDERICKSBURG, VIRGINIA 22401
TELEPHONE: (540) 373-5178
FAX: (540) 373-6281

COMMONWEALTH OF VIRGINIA
MICHAEL M. BAGBY
Lic. No. 11765
PROFESSIONAL ENGINEER

WICKLOW DRIVE IMPROVEMENTS

EMBREY HILLS
GPIN# 7860-90-3994
APPLICATION FOR ZONING MAP AMMENDMENT

CITY OF FREDERICKSBURG VIRGINIA

DATE:	2-27-14
SCALE:	1" = 30'
DESIGNED BY:	
DRAWN BY:	LT
CHECKED BY:	
FILE NAME: 20471-2 R12LAYOUT	
JOB NO.	20471-2
PLAN NO.	

REVISIONS

DATE

BCA

BAGBY, CALDWELL and ASSOCIATES, P.C.
CIVIL ENGINEERS AND LAND SURVEYORS
1965 JEFFERSON DAVIS HIGHWAY
FREDERICKSBURG, VIRGINIA 22401
TELEPHONE: (540) 373-5178
FAX: (540) 373-6281

COMMONWEALTH OF VIRGINIA
MICHAEL M. BAGBY
Lic. No. 11765
REGISTERED PROFESSIONAL ENGINEER

ROFFMAN ROAD IMPROVEMENTS

EMBREY HILLS
GPIN# 7860-90-3994
APPLICATION FOR ZONING MAP AMMENDMENT

CITY OF FREDERICKSBURG VIRGINIA

DATE:	2-27-14
SCALE:	1" = 30'
DESIGNED BY:	
DRAWN BY:	LT
CHECKED BY:	
FILE NAME:	20471-2 R12LAYOUT
JOB NO.	20471-2
PLAN NO.	

EXHIBIT C

EXHIBIT 4 - APPENDIX H

Estate Maintenance UPDATE
OF FREDERICKSBURG

User MARILLA
L-Chg 7/13/2015
Batch 15205MM
SSN#2: 000000000

OD, TREASURER
EDERICKSBURG
X 267
EDERICKSBURG VA 22404-0267

ADDRESS SERVICE REQUESTED

CITY OF FREDERICKSBURG
IMPORTANT--PLEASE READ

2014/2015 REAL ESTATE TAX

ELDERLY OR DISABLED MAY BE ELIGIBLE FOR A REAL ESTATE EXEMPTION IF THEY ARE AGE 65 OR OLDER OR PERMANENTLY DISABLED AND MEET FINANCIAL CRITERIA ESTABLISHED BY LOCAL ORDINANCE. FOR FURTHER INFORMATION CONTACT THE COMMISSIONER OF REVENUE AT (540)372-1004.

THE TREASURER COLLECTS TAXES, DOES NOT ASSESS PROPERTY, FIX VALUATIONS, SET RATES OR GRANT EXEMPTIONS AND HAS NO AUTHORITY TO MAKE CHANGES TO THE TAX ROLL.

003017

***AUTO**MIXED AADC 280 3017 T11:16
BRAGG HILL CORPORATION
11541 GRANARY HILLS DR
AMELIA COURT HOUSE VA 23002-4285

INFORMATION INQUIRIES

Commissioner of Revenue 540-372-1004
Payments 540-372-1001

YEAR	DEPT. # / TICKET #	PARCEL NUMBER / GPIN
2015	RE 2015: 679	7860-90-9711

DUE DATE: 5/15/2015
After 5/15/2015 add 47.76 penalty
After 6/01/2015 add 4.38 interest per month

DESCRIPTION	RATE	TOTAL VALUE	TOTAL TAX CHARGES
0.806AC S6 BL 273-5-50A WICKLOW DR IMPROVEMENTS ANNUAL TAX-REGULAR ASSESSMENT	.790	120,900	955.12
AC .81		TOTAL NOW DUE	477.56

PD 4/25/15 #1169

IT IS THE OBLIGATION OF THE TAXPAYER TO SEE THAT THE PROPER TAX BILL IS RECEIVED AND PAID ON TIME.

DETACH AND RETAIN THIS PORTION FOR YOUR RECORDS.

193 APP06 01/30/014

015710

EXHIBIT 4 - APPENDIX I

2016 Real Estate Tax Bill

CITY OF FREDERICKSBURG

P. O. BOX 267
FREDERICKSBURG, VA 22404-0267
BRENDA A. WOOD, TREASURER

BRAGG HILL COMMUNNITY CORP
PO BOX 7266
FREDERICKSBURG VA 22404-7268

Department: RE2016 **Ticket No:** 741
Account No: 5888
Property ID: 7860-90-9711

Property Description	Acres	Land Value	Land Use	Improvements	Mineral Value	Total Taxable Assessed	Tax Due 05/16/2016
0.806AC S6 BL 273-5-50A WICKLOW DR	2.54	120,900				120,900	$495.69

Tax Rate per $100: .8200
Annual Tax: $991.38
Total Due on 05/16/2016: $495.69

Version: 2015-12-10-16.18.01.629230

EXHIBIT 4 - APPENDIX I

2016 Real Estate Tax Bill

CITY OF FREDERICKSBURG

P. O. BOX 267
FREDERICKSBURG, VA 22404-0267
BRENDA A. WOOD, TREASURER

BRAGG HILL CORPORATION
11541 GRANARY HILLS DR
AMELIA COURT HOUSE VA 23002

Department: RE2016 **Ticket No:** 741
Account No: 5888
Property ID: 7860-90-9711

Property Description	Acres	Land Value	Land Use	Improvements	Mineral Value	Total Taxable Assessed	Tax Due 11/16/2015
0.806AC S6 BL 273-5-50A WICKLOW DR	.81	120,900				120,900	$495.69

Tax Rate per $100: .8200
Annual Tax: $991.38
Total Due on 11/16/2015: $495.69

Version: 2015-12-10-16.18.01.629230

EXHIBIT 4 - APPENDIX I

2015 Real Estate Tax Bill

CITY OF FREDERICKSBURG

P. O. BOX 267
FREDERICKSBURG, VA 22404-0267
BRENDA A. WOOD, TREASURER

BRAGG HILL CORPORATION
1206 WASINGTON AVE
FREDERICKSBURG VA 22401

Department: RE2015 **Ticket No:** 679
Account No: 5888
Property ID: 7860-90-9711

Property Description	Acres	Land Value	Land Use	Improvements	Mineral Value	Total Taxable Assessed	Tax Due 11/17/2014
0.806AC S6 BL 273-5-50A WICKLOW DR	.81	120,900				120,900	$477.56

Tax Rate per $100: .7900
Annual Tax: $955.12
Total Due on 11/17/2014: $477.56

Version: 2015-12-10-16.18.01.629230

EXHIBIT 4 - APPENDIX I

2014 Real Estate Tax Bill

CITY OF FREDERICKSBURG

P. O. BOX 267
FREDERICKSBURG, VA 22404-0267
BRENDA A. WOOD, TREASURER

BRAGG HILL CORPORATION
1206 WASINGTON AVE
FREDERICKSBURG VA 22401

Department: RE2014 **Ticket No:** 7917
Account No: 5888 **Supplement No:** 04
Property ID: 7860-90-9711

**** This is a supplemental bill ****

Property Description	Acres	Land Value	Land Use	Improvements	Mineral Value	Total Taxable Assessed	Tax Due 05/15/2014
0.806AC S 6 BL 273-5-50A WICKLOW DR	.81			60,450		60,450	$447.33

Annual Tax: $447.33
Total Due on 05/15/2014: $447.33

Version: 2015-12-10-16.18.01.629230

EXHIBIT 4 - APPENDIX I

2014 Real Estate Tax Bill

CITY OF FREDERICKSBURG

P. O. BOX 267
FREDERICKSBURG, VA 22404-0267
BRENDA A. WOOD, TREASURER

BRAGG HILL CORPORATION
1206 WASINGTON AVE
FREDERICKSBURG VA 22401

Department: RE2014 **Ticket No:** 7882
Account No: 5888 **Supplement No:** 02
Property ID: 7860-90-9711

**** This is a supplemental bill ****

Property Description	Acres	Land Value	Land Use	Improvements	Mineral Value	Total Taxable Assessed	Tax Due 01/31/2014
0.806AC S 6 BL 273-5-50A WICKLOW DR	.81			20,196		20,196	$149.45

Annual Tax: $149.45
Total Due on 01/31/2014: $149.45

Version: 2015-12-10-16.18.01.629230

EXHIBIT 5

Community Planning
and Building Department
Planning Services Division

City of Fredericksburg
715 Princess Anne Street
P.O. Box 7447
Fredericksburg, VA 22404-7447
Telephone: 540 372-1179
Fax: 540 372-6412

PRE-APPLICATION CONFERENCE APPLICATION

DATE: FEBRUARY 29, 2016

LOCATION OF PROPERTY: END OF WICKLOW DRIVE

APPLICANT: MARK GLAZEBROOK

MAILING ADDRESS: 11541 GRANARY HILLS DRIVE
AMELIA COURTHOUSE, VA. 23002

PHONE: 540-226-1618 E-MAIL ADDRESS: MWGLAZE@gmail.com

ZONING OF PROPERTY: R-12 GPIN #: 7860-90-9711

PREVIOUS USE: VACANT PROPOSED USE: TOWNHOUSES (10)

PLEASE DESCRIBE THE PURPOSE FOR ATTENDING THE PRE-APPLICATION CONFERENCE.

DISCUSS DEVELOPMENT OF TEN (10) TOWNHOUSES ON 0.806 ACRE PARCEL ON WICKLOW DRIVE. PARCEL IS ADJACENT TO SECTION 6 OF BRAGG HILL AND CAL RIPKEN PARK TO NORTH.

☒ SITE PLAN, PLAT, OR TAX MAP ATTACHED

SIGNATURE OF APPLICANT

2-29-16
DATE

DATE RECEIVED: _____ DATE OF MEETING _____

If you have questions, please contact Marne Sherman in Planning Services Division at (540) 372-1179 or Debby Hall in Building Services Division at (540) 372-1080.

For Office Use:

CHECK IF APPLICABLE:
☐ SITE PLAN SUBMITTAL
☐ SPECIAL USE PERMIT REQUIRED
☐ REZONING REQUIRED
☐ PLAT/SUBDIVISION SUBMITTAL
☐ SPECIAL EXCEPTION REQUIRED
☐ OTHER

NO FEE REQUIRED

EXHIBIT 5

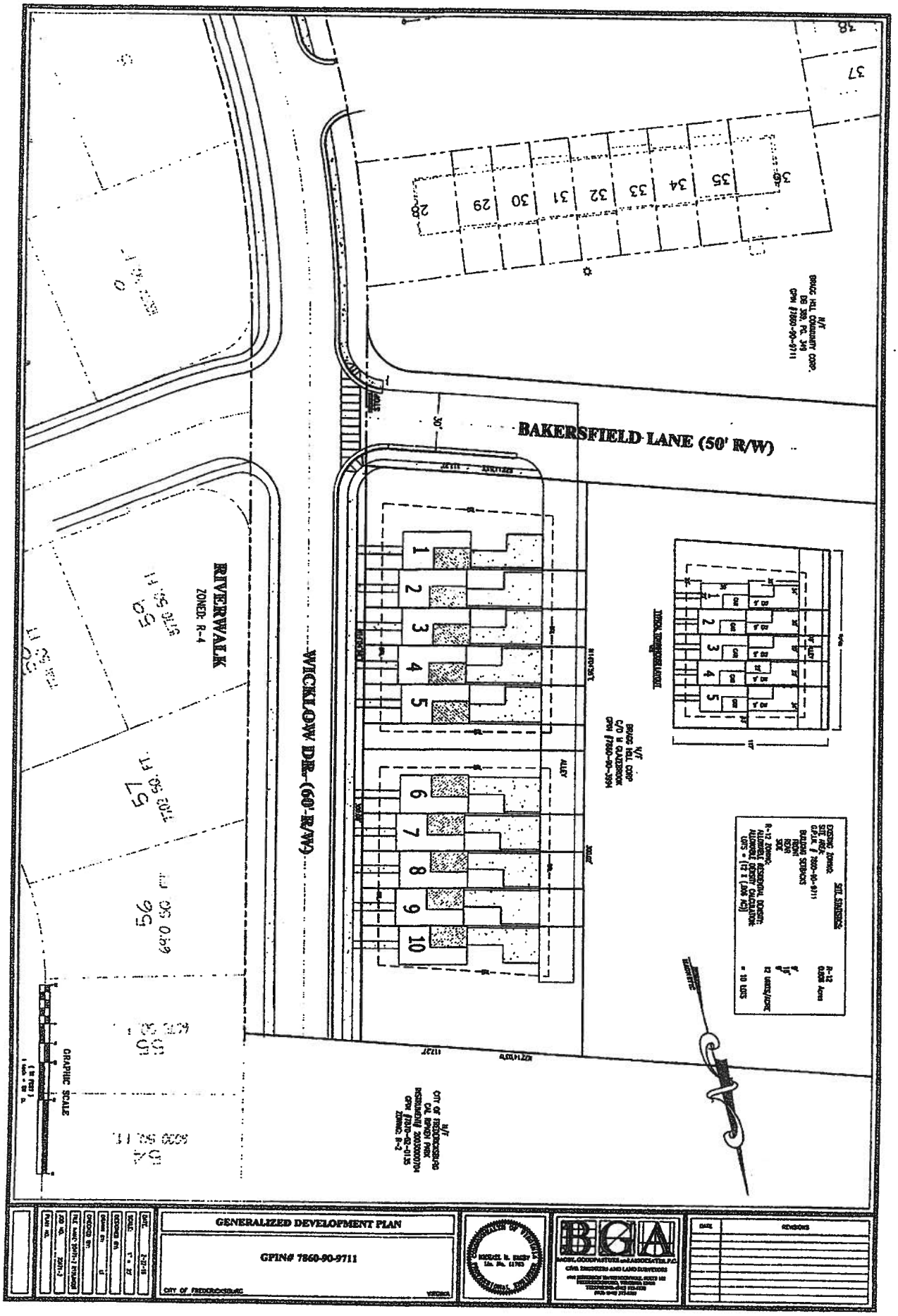

BAKERSFIELD LANE (50' R/W)
WICKLOW DR. (60' R/W)
RIVERWALK
ZONED: R-4
GENERALIZED DEVELOPMENT PLAN
GPIN# 7860-90-9711
CITY OF FREDERICKSBURG
VIRGINIA
GRAPHIC SCALE

EXHIBIT 6

Mike Craig
Zoning Administrator

City of Fredericksburg
PO Box 7447
Fredericksburg, VA22404-7447
Telephone: 540-372-1179
Fax: 540-372-6412
mjcraig@fredericksburgva.gov

012-16D

March 10, 2016

Bragg Hill Corporation
C/O Mr. Mark Glazebrook
11541 Granary Hills Dr.
Amelia Courthouse, Va 23002

Re: Technical Review Committee Application regarding GPIN 7870-00-3906

Dear Mr. Glazebrook:

We received your Technical Review Committee (TRC) application regarding the development of a portion of your property now identified as GPIN 7870-00-3906 into 10 ten townhomes. The zoning on the application is listed as R-12, Residential. The City's official zoning map shows that this property is zoned R-2, Residential.

The City Council rezoned 1,121 acres from R-1 to R-2 Residential, R-12 Residential, R-16 Residential, and R-30 Residential by ordinance #14-06 on February 11, 2014. A copy of the ordinance is attached to this letter. GPIN 7870-00-3906 was not individually identified on the exhibit maps at the time of the rezoning, however, I've sketched it onto the attached map for illustrative purposes. The portion of the property now identified as GPIN 7870-00-3906 was rezoned from R-1 Residential to R-2 Residential by Ordinance 14-06.

Any person aggrieved by this determination may have the right to appeal to the Board of Zoning Appeals within 30 days of the date of this determination. Such appeal shall be in writing to the Zoning Administrator, specify the grounds for the appeal and include an appeal fee of $400.00.

Sincerely,

Mike Craig
Zoning Administrator

ENC: Ordinance 14-06
Technical Review Committee Application

CC: Bagby, Goodpasture, and Associates, P.C.
1985 Jefferson Davis Highway
Suite 102
Fredericksburg, Virginia 22401

Garner | Economics LLC
solutions that work

October 30, 2015
Edited: December 8, 2015

A Competitive Realities Report for Fredericksburg, Virginia

Prepared for the

City of Fredericksburg, Office of Economic Development and Tourism

715 Birkdale Drive | Atlanta, GA 30215 | p 770.716.9544 | f 770.719.8911
www.garnereconomics.com

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INTRODUCTION

In August 2015, the City of Fredericksburg, Virginia retained the firm of Garner Economics, LLC to develop an Economic Development Master Plan (strategy) that will take into account the current state of the City's existing plans and will provide a roadmap for Fredericksburg to create economic opportunities for its citizens.

The focus of this engagement is for the City of Fredericksburg to understand the product improvement, marketing, and potential organizational changes it must make to ensure that the City strengthens its competitive position and is able to attract and retain the types of businesses that will create jobs and opportunities for its citizens.

Specifically, the scope of services for the overall project includes:

(1) A comprehensive and holistic assessment of key forces driving the economy and its shifting dynamics;

(2) An Assets and Challenges Assessment (A&C) of Fredericksburg from the eyes of a site location consultant that facilitates investment decisions;

(3) Recommendations for business targets suitable for the City based on our research and analysis; and finally,

(4) A set of implementable recommendations that the leadership in the City can utilize to enhance the economic well-being of the area and make Fredericksburg a desirable business location and enhance its quality of place.

This *Competitive Realities Report* (CRR) is the first of two reports that will be provided to the City of Fredericksburg. It documents the work of the first two elements of the project scope and summarizes the findings of Phase I (see Figure 1 on page 4).

METHODOLOGY

The CRR is a compilation of local facts and data points with quantitative analysis and some subjective opinions noted in the Assets and Challenges Assessment. Together, the Assets and Challenges Assessment, Community Engagement Summary, and the Economic and Labor Analysis inform this process, upon which the strategy and its recommendations will be built.

The CRR offers no recommendations. The final strategy report will consist of the business target recommendations along with conclusions and recommendations for how the City of Fredericksburg can enhance its global competitiveness. (The final report will be presented in early 2016.)

Assets and Challenges Assessment

Our approach to creating the CRR began with the consulting team conducting an Assets and Challenges Assessment of the City. This was done through a windshield tour of the area and against a pre-determined list of 47 criteria used to evaluate the area from a site-selection perspective. Garner Economics assessed the City based on the qualities, elements, and infrastructure that a business will look for when considering the City as a place for its operations.

The assessment is both an objective and subjective evaluation of the area. We applied many of the same criteria to assess

Fredericksburg that we use when engaged by a corporate client in evaluating communities for possible investment. The assessment allows us to document challenges that exist in the City that constitute barriers to successful economic development. By knowing what challenges or gaps exist, the City can take the steps necessary to ameliorate the situation, strengthen its overall "product," and be a more attractive business location. Likewise, by knowing its strengths, the City can better leverage them in its efforts to attract businesses.

The objectives of the Assets and Challenges Assessment are to:

- Help local leaders understand the City's potential so that they can best develop realistic goals;
- Identify key strengths to emphasize in economic development marketing efforts; and
- Identify key weaknesses that may limit investment in the City so that remediation of these local challenges may occur.

Figure 1
Project Phases

Phase I: Discovery	Phase II: Strategy	Phase III: Implementation Recommendations
Review past plans and goals and evaluate Fredericksburg's competitive position from an economic development perspective: • Demographic & economic analysis • Assets and Challenges Assessment of the City • Labor market & business cluster analysis Solicit public input through focus groups and an electronic survey. Compare Fredericksburg to four benchmarks within Virginia, the Commonwealth itself, and the nation. Publish the *Competitive Realities Report* (a summary of Phase 1).	Position Fredericksburg to achieve success through an actionable strategy including short- and long-term tactics (3-5 years) addressing: • Business target recommendations • Entrepreneurship • Business recruitment and marketing • Tourism • Workforce needs • Gaps in infrastructure needed to best support target businesses	High-level implementation plans for actionable items, including: • Target business recruitment & marketing strategy, including the hospitality sector • Retention efforts • Budgeting & phasing • Appropriate engagement with other economic development efforts • Workforce development support • Metrics to track success Present the final report to an external audience.

Benchmarking

Because Fredericksburg must compete with other geographies—including those globally—it is important to understand where the City stands compared to those key competitors. To conduct such benchmarking, Garner Economics evaluated key demographic and economic indicators for the City and compared the community to statewide and national-level data, as well as to Charlottesville, Manassas, Winchester, and Staunton. These benchmark geographies were selected by the City of Fredericksburg.

The variables against which Fredericksburg and the other benchmark cities, the nation, and the state were compared include:

- Growth trends
- Age group composition
- Race and ethnicity
- Crime rates
- Migration trends & sources of change
- Composition & sources of income
- Proprietor trends
- Wage comparison
- Retail leakage analysis
- Employment growth
- Unemployment trends
- Exports

Stakeholder Input

Finally, as a complement to the assessment of the physical and regulatory structure of Fredericksburg against its benchmarked peers, Garner Economics conducted four focus groups with key community stakeholders and conducted an online survey to solicit a variety of perceptions of the City's business climate and areas for improvement.

The following chapters describe our findings within a cohesive economic assessment of Fredericksburg's current state and economic potential. It sets the groundwork for developing strategies and recommendations to assist the City in providing excellent economic development service delivery within the scope of its mission.

CHAPTER 1: COMMUNITY ENGAGEMENT ON BUSINESS CLIMATE AND ECONOMIC COMPETITIVENESS

Garner Economics believes that community input is a vital part of the strategic planning process. In addition to providing a context around the data accumulated in Phase I of the project, feedback from stakeholders in a community provides a way to validate conclusions. Similarly, the input often raises issues or nuances that are critical to understanding the community that may or not be discernable through desktop research.

Given this, Garner Economics undertook two community engagement streams to better understand the economic development issues facing the City of Fredericksburg:

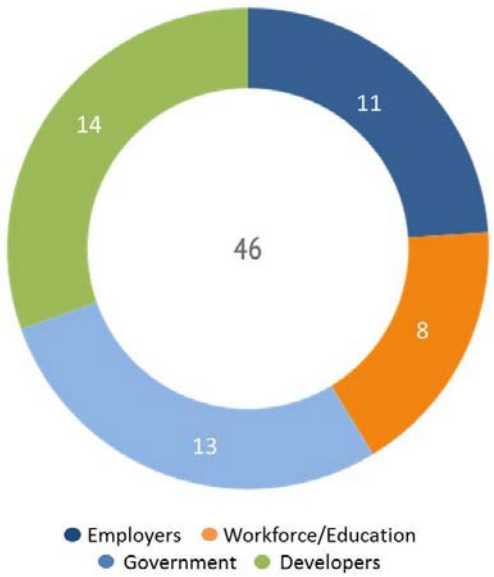
- **Focus Groups**

  Four focus groups were held on September 30, 2015, and organized into the following categories: Employers, Government, Workforce and Education, and Developers. The Office of Economic Development and Tourism (EDT) and two city council champions identified and invited participants for the groups.

  The focus groups solicited stakeholders' perceptions and opinions of the business climate of the City and its economic development efforts. Additionally, questions gauged the stakeholders' thoughts on the area's attractiveness to companies and the types of companies that would be a good fit for the region.

  A total of 46 people participated in the four groups. The breakdown of the participants by group is shown in Graph 1. A summary of the focus group responses and a list of the focus group participants are included in Appendices A and B, respectively.

Graph 1
Focus Group Participants



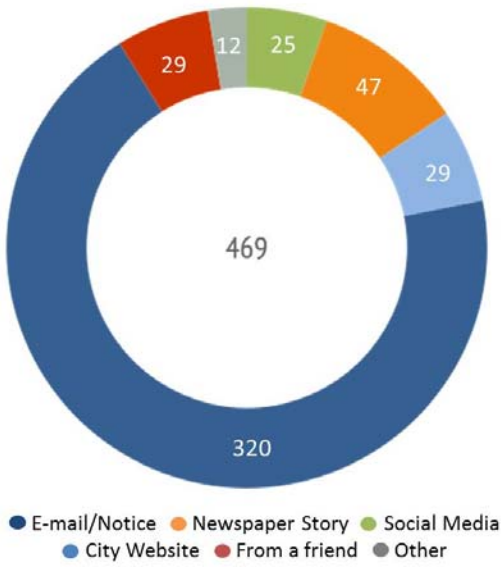
- **Electronic Survey**

  Based on feedback received from the focus groups, Garner Economics developed and launched a survey to solicit feedback from a broader group of Fredericksburg's stakeholders. The survey was open October 7-16, 2015, and 469 people completed the survey. Two-thirds of the survey respondents live and work in Fredericksburg (22401 ZIP code) or in the 22405, 22406, 22407, or 22408 ZIP codes. The remaining respondents either live or work in ZIP codes beyond the above

area. Graph 2 illustrates how the respondents learned of the survey.

The most frequently provided responses to questions asked during the focus group were used as the response options for the survey. Survey respondents were also given an open-ended section to provide "other" responses. A more detailed profile of the respondents participating in the survey is included in Appendix C.

Graph 2
Sources of Survey Respondents



Key Themes

Feedback from both streams was relatively consistent on broad, overarching issues facing Fredericksburg. However, given the higher degree of interaction with the economic development organizations and the impact that such service delivery has on their work or livelihood, participants in the focus groups tended to have more detailed perceptions of the economic development process in the City. Focus group participants provided more detail in their responses regarding the implications of various ordinances and experiences working with the various City departments.

Nevertheless, both groups held similar perceptions on the strengths of the City, the nature of inhibitors to growth, and the potential for the City going forward.

Among both groups, the overarching key themes that emerged include:

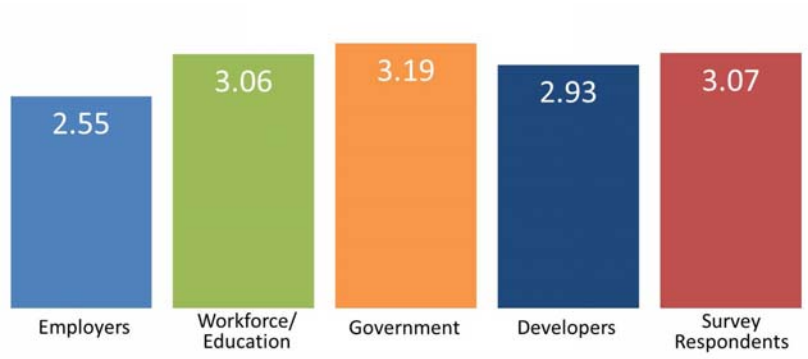
- **Desire for more streamlined interaction with the City.**

  Both focus group participants and survey respondents noted that it is often difficult to interact with the City (staff and leadership) in regard to business issues and ordinances. As noted in Graph 3, both groups rated the City's business climate as average and noted that the concern is not so much with the policies and regulations in place (though several could and should be updated), but more with the way that initiatives are implemented or regulations enforced (or not).[1]

[1] Business climate was defined as "those policies and laws enacted by the local government that impact local businesses."

Graph 3
Community Views of Fredericksburg's Business Climate

Focus group participants and survey respondents were asked to rank the business climate of the City of Fredericksburg. The average scores given by group are as follows:



- **Pride in the historic and small-town aspects of the City and a desire to protect it.**

  All of the focus groups and a large number of survey respondents noted the City's quality of place as an asset. The groups also noted the potential for the community to build on its quality of place to strengthen its competitiveness and differentiate Fredericksburg as a place for businesses. In addition to the historic assets of the City, groups noted the natural beauty and recreational amenities; the proximity to Washington, DC and Richmond; and the City's position along a major transportation corridor as assets upon which it can build.

Focus group participants and respondents noted the lack of parking (especially in downtown) as a potential impediment to future growth of the core areas in the City. Both groups also noted the need to create/provide a 21st Century infrastructure in the downtown so as to attract different uses in those spaces aside from residential, restaurants, and lower-end retail. Similarly, both groups noted the need to differentiate Fredericksburg and its growing appeal to millennials and young entrepreneurs.

More so than the discussions in the focus groups, survey respondents were also vocal about the need for affordable housing in the region. Several open-ended comments noted the lack thereof, especially as it relates to attracting young talent to live and work in Fredericksburg.

"Our strength is that we are historic! Our history, our story, the historic fabric is what makes this place unique, what attracts people to this area to visit, live, and work; it is the foundation of the quality of life."

—Survey Respondent

- **Desire to attract more jobs and stem out-commuting patterns**

  Both focus group participants and survey respondents noted the need to attract more corporate employers and businesses that would provide residents of Fredericksburg employment alternatives other than commuting to the Washington metro as top priorities. Focus group responses also recognized the need to create locations for where such activity can occur—be it in downtown, mixed-use complexes, or upgrades to existing business parks.

- **Need to improve traffic and accessibility along the I-95 road and rail corridor**

  Both focus group participants and survey respondents noted traffic congestion along I-95 and on gateway roadways as a growing challenge and deterrent to the area's quality of place. They noted the need to improve the transportation corridors (e.g., extending HOV lanes along I-95) and advocate for more frequent VRE service.

- **A desire for more, true regionalism**

  Recognizing that the relatively small land mass of the City places it in a difficult position in terms of providing the services and infrastructure the growing Fredericksburg population desires, focus group participants and survey respondents noted the benefit that would be accrued if a more regional approach were taken. Several focus group respondents noted the recent improvements in the Fredericksburg Regional Alliance.

- **Maximize the use of the Rappahannock River**

  The majority of focus groups and a large number of survey respondents noted the asset that the Rappahannock River is for Fredericksburg, but note that it is not used to its full potential (although participants in the focus groups also recognize the limitations to accessing the river and limitations, therein). Nevertheless, both groups see the river's potential to strengthen the City's quality of place.

"The whole area—in particular, the city—is in a great spot to attract businesses. You have a workforce that is highly educated but mostly goes north (and is miserable as a result) for employment. If there were more opportunities here that the city (and counties) could attract, then I think you'd see significant increase in growth and a feeling of community (because people are working and living here)."

—Survey Respondent

"I think it would be good for City politicians and bureaucrats to engage in an all-in series of strategy sessions to agree on who we are as a city, and all agencies focus together and communicate better to make sure that not only a particular department can thrive, but that the entire City can thrive and achieve the goal of a successful, well-balanced, historically significant element of the Commonwealth."

—Survey Respondent

- **Desire for easier mechanism to deal with the City**

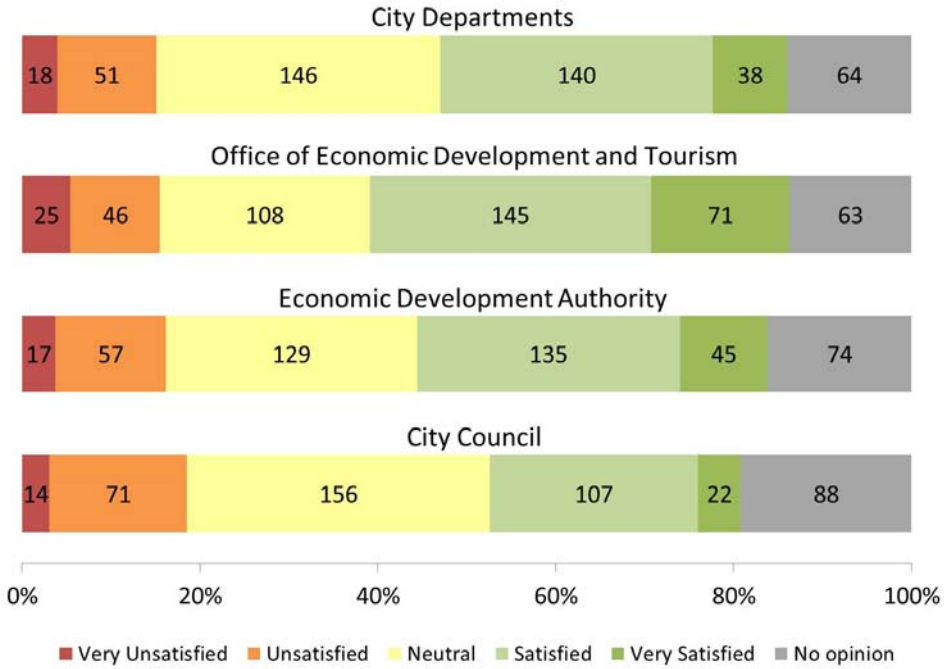
  Three of the four groups were very vocal about the poor implementation of existing regulations and policies and noted that the poor execution related to inconsistencies contributes to the negative perceptions of the City's business climate. They noted that the permitting process is cumbersome and often unpredictable. Participants blame the outdated codes and zoning (compared to the types of development and uses that have evolved over time) and the inflexibility of City staff in interpreting and applying the regulations as the source of the frustrations over the process. Survey respondents echoed these concerns, most often noting a perceived lack of customer service and a perception that most City departments are reactive instead of proactive to business needs.

  Survey respondents echoed this perception in open-ended comments. However, the respondents were relatively positive when asked to rank their level of satisfaction with various economic development entities (Graph 4).

Graph 4
Satisfaction Rankings

What are your past experiences with, and current perceptions of, the various entities within the City involved in business investment attraction and retention?

"The Economic Development Office staff doesn't have the authority to place a sense of urgency on the rest of City staff. They need to be empowered."
— Focus Group Participant



- **Optimistic about Fredericksburg's future.**

  When asked for ideas on what the City could do to strengthen its competitive position, the large majority of participants and respondents were optimistic and saw much potential. Most suggestions looked for ways to improve the City's quality of place, maintain its historic character, and decrease the need for such a large segment of the population to out-commute each day (Graph 4).

Graphs 5-9 highlight the feedback in terms of the overall competitive position of the City.

Graph 5

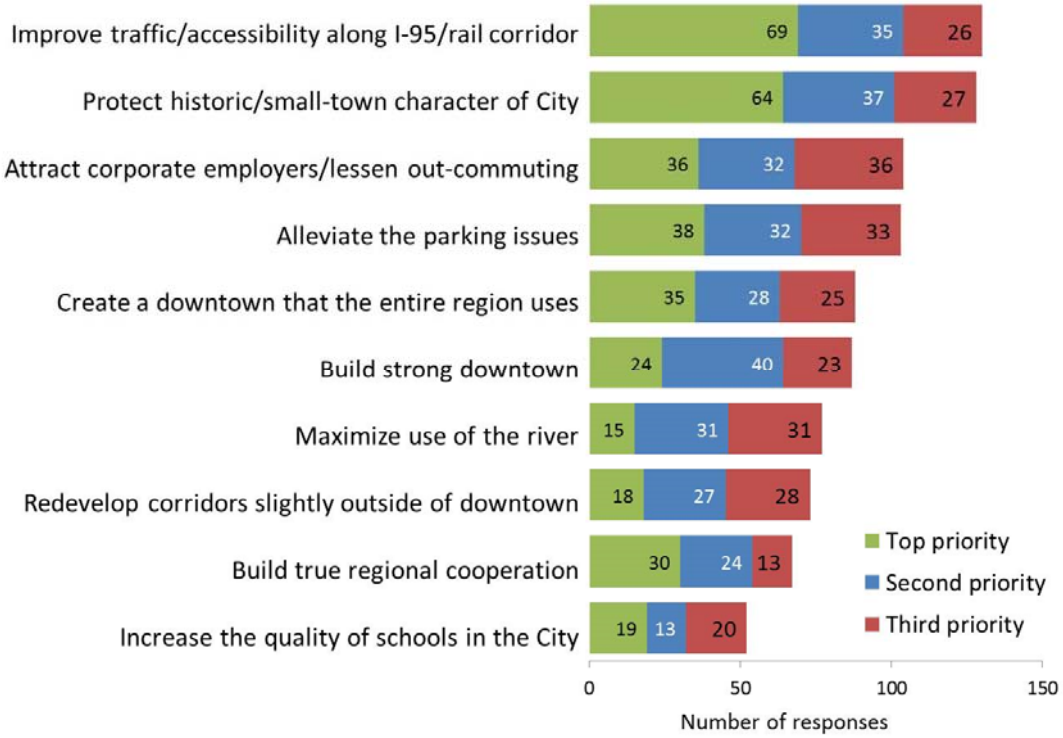
Priorities to Strengthen Fredericksburg's Competitive Position as a Place for Businesses and Talent

When asked to indicate the top items they would like to see the City leadership take on to strengthen Fredericksburg's ability to attract and retain quality companies and talent to the City—without worrying about money or politics—the two groups responded as follows:

Most frequently noted by focus groups:

- Attract more corporate employers to lessen out-commuting patterns
- Maximize the use of the Rappahannock River
- Improve traffic and accessibility along the I-95 road and rail corridor
- Build a strong downtown and have appropriate development elsewhere
- Protect the historic and small-town character of the City
- Build true regional cooperation

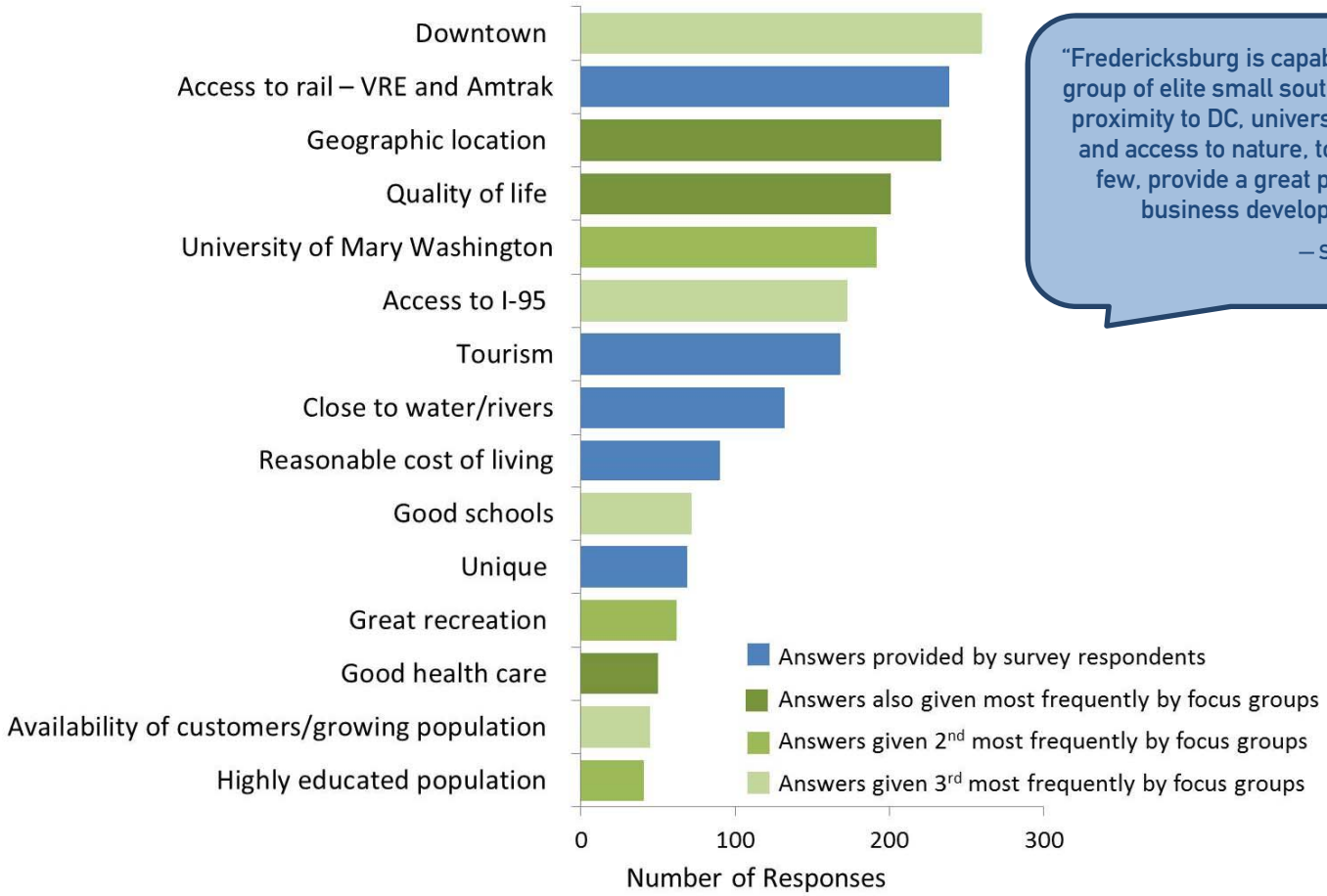
Most frequently noted by survey respondents:



Graph 6
Perceived Strengths

When asked to indicate Fredericksburg's strengths, the two groups responded as follows:

Note: Similarities between frequently provided responses by both the focus group participants and survey respondents are indicated in green.



"Fredericksburg is capable of joining a group of elite small southern cities. Its proximity to DC, university presence, and access to nature, to name but a few, provide a great platform for business development."

— Survey Respondent

Graph 7
Perceived Inhibitors

When asked to indicate issues that inhibit Fredericksburg from recruiting businesses, the two groups responded as follows:

Note: Similarities between frequently provided responses by both the focus group participants and survey respondents are indicated in orange.

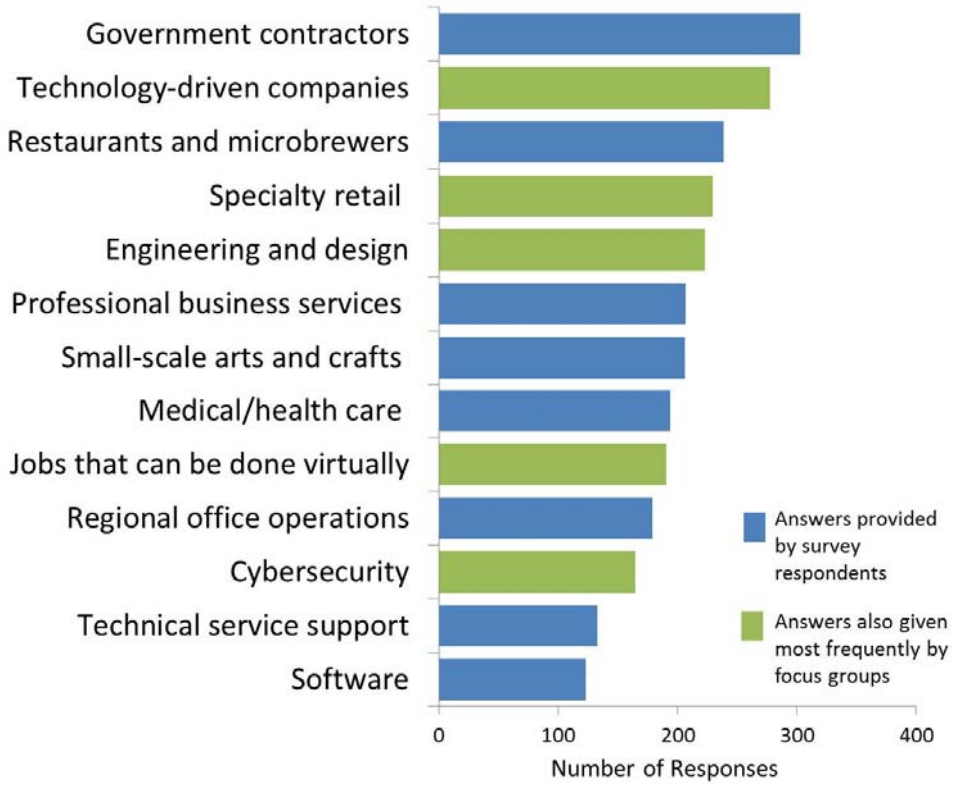
"To be attractive for businesses to start, there needs to be more cohesiveness between all entities involved. Faster permitting process, perhaps have a 'one stop information person' who can tell you exactly what you need and with whom to speak regarding the necessary processes of starting their particular business."

—Survey Respondent

Graph 8
Potential Industries

When asked what types of companies would be a good fit for the area, the two groups responded as follows:

Note: Similarities between frequently provided responses by both the focus group participants and survey respondents are indicated in green.

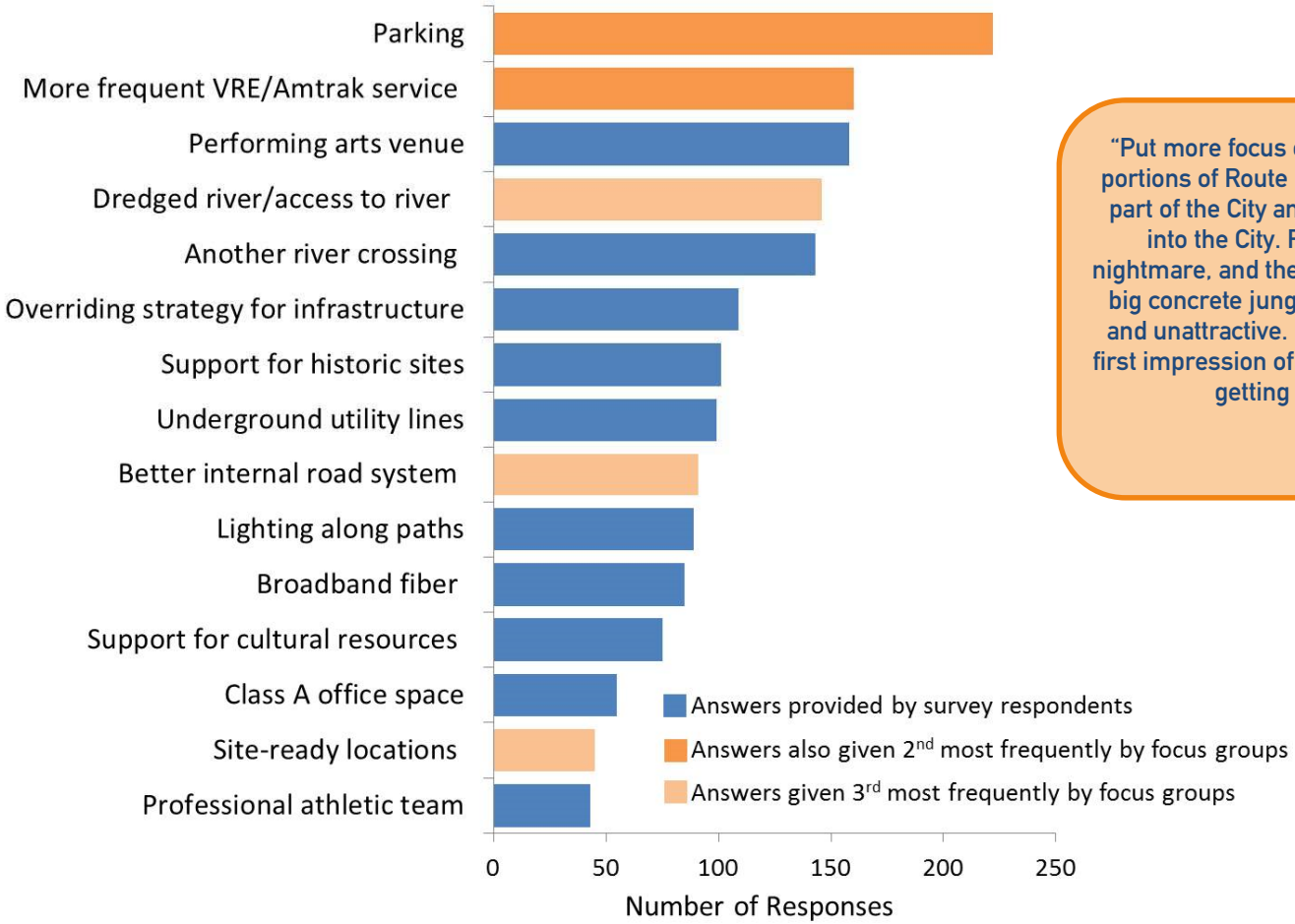


"We need to increase the diversity of the regional demographics. Our communities around the region offer little to the 21-30 population. Housing isn't affordable, local jobs don't pay competitive wages (especially for college-educated millennials) and there is little to offer in entertainment/nightlife. A large focus of the strategic plan for the city should be creating a regional culture that is less hostile, more open to, and providing incentives for staying to younger people."

— Survey Respondent

Graph 9
Lacking Infrastructure

When asked what hard or soft infrastructure* is weak or missing in Fredericksburg, the two groups responded as follows:



"Put more focus on areas such as the portions of Route 1 and Route 3 that are part of the City and serve as gateways into the City. Route 3 is a traffic nightmare, and the shopping centers are big concrete jungles that are outdated and unattractive. They make for a bad first impression of Fredericksburg when getting off of I-95."

— Focus Group Participant

*Hard infrastructure was defined as the physical networks such as roadways, sewer, broadband Internet, airports and/or ports. Soft infrastructure was defined as institutions or places that support the economic, health, and cultural climate of a place, such as the education system, the health care system, system of government, and/or parks.

A more detailed summary of the focus group discussions and the survey responses us included in Appendices A and C.

CHAPTER 2: ASSETS AND CHALLENGES ASSESSMENT

The City of Fredericksburg offers a unique mix of assets for businesses that are contemplating relocation, expansion, or a startup. Our approach in conducting the Assets and Challenges Assessment (A&C) is to employ the same criteria and methodology we use when we conduct a community evaluation for our corporate clients when exploring locations for investment. By understanding its assets and challenges from a location strategy perspective, we believe that the City will be better positioned to compete more effectively and to resolve area challenges that are likely inhibitors to investment projects. By recognizing and understanding strengths and opportunities, the City will ultimately be able to determine the proper target audience of companies to which it should effectively communicate the area's assets.

Garner Economics analyzed 47 community factors as part of the assessment. Ratings were identified by evaluating the City's position for each of the factors against the Commonwealth of Virginia, the United States, and in many instances, the benchmarked cities of Charlottesville, Manassas, Winchester, and Staunton.

We define a Neutral rating as normal in the realm of economic development opportunity and competitiveness. An Asset rating indicates a positive feature of the City that would be evaluated and rated as a competitive strength versus the benchmark locations. A Challenge rating identifies a factor that is considered a relative deficiency compared to other locations, which should be addressed with future remediation and may be an impediment to economic development if not resolved over time.

Of the 47 variables analyzed, 14 are considered an Asset and 11 a Challenge (22 rated as Neutral). With 22 neutral rankings, Fredericksburg has too many neutral rankings and multiple variables noted as challenges based on the ratio of an economically healthy, dynamic city. The objective in the future will be for those policymakers engaged in local economic development to move the bar with the neutral rankings from neutral to an asset, and the challenge ranking to neutral.

To enable a summary overview of the report's main findings for readers, a set of dashboard icons is presented. Each finding has an accompanying icon to assist with interpretation. Readers are encouraged to review the supporting data to gain a more complete understanding of those areas of interest in the full report.

REPORT DASHBOARD

Indicates the City is better (more positive) compared to a majority of the benchmark geographies or points to a positive trend or asset within the area.

Indicates the City is neutral or normal, neither positive nor negative. Indicator may represent an observation or be in the middle of the benchmark geographies.

Indicates the City is worse compared to a majority of the benchmark geographies or points to a negative trend or challenge within the area.

Access to Markets

Fredericksburg is within a day's drive to over 121 million people or 1/3 of the US population. Its geographic location makes it an ideal spot to serve regional, national, and international markets. With access to I-95 and close access to Dulles International Airport as well as two other nearby commercial passenger airports, passenger and freight rail, and close access to the Ports of Norfolk and Baltimore, it is in an envious position of having many transportation assets that companies need.

Access To Markets	Rating
Centrally located for major regional market	1
Centrally located for national market	2
Well positioned to serve international markets	3
Interstate highways	4
Rail service	5
Within 60 miles of commercial air passenger service	6
General aviation airport capable of handling corporate aircraft	7
Broadband rankings	8

Labor

Skilled clerical, technicians, and scientists are available in Fredericksburg, based on a high location quotient. The availability of post-secondary education is diverse, and the home of the University of Mary Washington gives Fredericksburg a unique advantage for a small (population) community. Skilled industrial workers are nearly nonexistent, primarily since Fredericksburg has a very small industrial base. The lack of a local, degreed engineering program is a challenge as it relates to recruiting younger engineering talent out of college.

LABOR	RATING
Availability of skilled industrial workers	↓ [9]
Availability of skilled clerical workers	↑ [10]
Availability of technicians and scientists	↑ [11]
Availability of managerial personnel	– [12]
Cost of labor	– [13]
Availability of post-secondary vocational training	↑ [14]
Within 1/2 hour of major university/college	↑ [15]
Availability of engineering program	↓

Local Economic Development Program

The City of Fredericksburg Office of Economic Development and Tourism (EDT) is staffed by hard-working, well-intentioned individuals with a challenged budget and City policies that are poorly perceived by many in the business community trying to make investments. As the group responsible for promoting economic development globally, only $55,000 is dedicated to advertising. Focus group participants in the employer category gave a below average ranking to the City's business climate, as did the developers group. Garner Economics observed a lack of understanding of the economic development process by some in leadership roles during the community engagement input, e.g., what companies consider important in their investment decision and how government can affect an investment outcome.

Local Economic Development Program	Rating
Adequate level of professional staff	16
Involvement of both public and private sectors	17
Local economic development organization has a strategic plan	18
Level of leadership support of economic development program	19
Level of cooperation between various organizations involved in economic development activity	20
Level of awareness of community regarding economic development	21
Level of funding for local economic development program	22

Access to Space

Fredericksburg has a very limited supply of available Class A office space. Total office inventory is approximately 2.6 million sq. ft. with an 8 percent vacancy rate. Demand is robust, and as Class A space becomes totally absorbed, then Class B and Class C follow, based on demand. Industrial sites and buildings that meet Garner Economics' definition of suitable or attractive based on that region's target markets are in short supply. The City proper has a gross inventory of 1.4 million sq. ft. of industrial space.

ACCESS TO SPACE	RATING
Availability of fully served and attractive industrial sites and space	23
Availability of fully served and attractive office sites and space	24

Access to Capital/Incentives

The City offers a wide array of targeted incentives devised to induce companies engaged in technology, tourism, and the arts and culture. The Fredericksburg EDA, a public agency, acts as a catalyst for economic growth that improves Fredericksburg's quality of life. The EDA receives its funding from annual fees derived from the issuance of bonds for qualified borrowers. It has several matching grant programs that promote downtown revitalization, commercial building façade improvements, business development and expansion, strengthening of the City's arts businesses, special events, and non-profit projects related to economic development. Venture capital from local sources for new business startups is limited.

ACCESS TO CAPITAL/INCENTIVES	RATING
Availability of incentives to induce specific types of targeted development	25
Availability of low-interest loans or grants for small business	26
Availability of venture capital from local sources for business startups	27

Government Impact on Business

Water and sewer capacity are considered normal within the scope of future population growth and the region's targeted industries. Water and sewer capacity are at 7 MGD and 6 MGD respectively. SAT scores are higher than the US average but lower than the state and several benchmark communities. Local business permitting procedures are considered a challenge by many participants in the focus groups and from respondents in the electronic survey. There are no specific assets listed in the rankings for this section.

GOVERNMENT IMPACT ON BUSINESS	RATING
Availability of adequate water and wastewater treatment capacity	28
Condition and maintenance of local streets	
Level of traffic-carrying capacity of local streets and highways	29
High school SAT test scores assessment	30
Business permitting procedures and costs	31
Local property taxes	32

Quality of Place

Quality of Place ranks just behind Access to Markets as having the most asset rankings, with four. Cultural activity, Mary Washington Hospital and health care in general, a variety of local restaurants, and the appearance of the Central Business District all help to differentiate Fredericksburg. Lack of a four- or five-diamond hotel is a challenge, especially for a community with a significant hospitality economy. A high cost-of-living index and a high crime rate compared to its benchmarks are also an impediment.

QUALITY OF PLACE	RATING
Availability of executive-level housing	33
Availability of moderate-cost housing	34
Availability of apartments	
Cost-of-living index	35
Level of crime	36
Level of cultural activity	37
Availability of recreational opportunities	38
General appearance of the community	39
Availability of major shopping facilities	
Availability of adequate medical facilities	40
Availability of first-class hotels, motels, and resorts	41
Diversity of local eating establishments	42
Appearance of the Central Business District	

The following endnotes support the rankings offered in the Assets and Challenges Assessment.

[1] Within 500 miles of 121.5 million people or 1/3 of the US population.
[2] IBID
[3] Within 2.5 hours of the Ports of Norfolk and Baltimore. Within 60 miles of Dulles International Airport.
[4] On I-95
[5] CSX, Amtrak, and VRE
[6] IAD, DCA, and RIC
[7] Stafford Regional Airport, 8 miles from the City.
[8] Households in Fredericksburg have the lowest availability (access) to DSL compared to the four peer communities, state, and nation. Fredericksburg's cable availability value of 86.1% is above the state average of 79.5% and just slightly below the national availability of 88.8%. Charlottesville has the highest availability to cable at 97.5%. Fredericksburg's medium & large businesses experience higher median download speeds than Manassas, Winchester, the state, and nation.
[9] LQ of .33
[10] LQ > 1.5
[11] LQ > 3.0
[12] LQ between .77 and 1.33
[13] *2005-2014 Change in Estimated Average Weekly Wage*
Highest Relative Number Shaded

	2014	2005-2014	
	Per Job	$	%
Fredericksburg	$782	$158	25.3%
Charlottesville	$939	$231	32.6%
Manassas	$1,150	$239	26.2%
Winchester	$870	$198	29.5%
Staunton	$619	$127	25.8%
Virginia	$1,018	$205	25.2%
United States	$988	$262	36.1%

Source: Bureau of Labor Statistics, Garner Economics

[14] Multiple public and private educational institutions, e.g., Germanna Community College, Eastern Virginia Career College, Strayer University, University of Maryland University College, James Monroe High School
[15] University of Mary Washington with 4,500 undergraduate and graduate students
[16] Subjective opinion of the consultants based on size of community and product inventory to promote. Six FTE's and 15 PT.
[17] EDT is a city agency but has private participation as board members through its related EDA.
[18] First developed in 2010. Updated in 2014. Currently undertaking a new plan.
[19] Elected and appointed leadership are involved.
[20] Focus groups and survey respondents were critical of various City groups that facilitate the development process; overall complimentary of the EDT, based on the constraints they work under as a City agency.
[21] In focus groups, it was especially concerning to hear people in leadership positions who are not aware or informed of the economic development process.
[22] $1.0 million FY '15 budget. Only $40K budgeted for advertising (marketing)
[23] Those listed on the City's ED website are older with limited use. The region has 12.8 million sq. ft. inventory with 1.4 million in the City of Fredericksburg.
[24] The City has 2.6 million sq. ft. of inventory and an 8 percent vacancy rate, 13-14 percent in the region. Demand is robust. http://cbcelite.com/wp-content/uploads/2015/08/Q2-15-INDUSTRIAL-CBCEMarketVantagePoint.pdf
[25] The City offers a wide array of targeted incentives related to Technology, Tourism, and Arts & Culture.
[26] Various banks and the Fredericksburg EDA
[27] There are limited success stories of firms using startup sources. There are VC firms that have expressed an interest in getting more engaged locally.
[28] 7 MGD water capacity with estimated future demands planned to 2060. Sewer capacity currently at 6 MGD +/- .
[29] Focus groups respondents spoke on the challenges of traffic congestion based on the scale of the streets.
[30] 2014 Public School SAT Scores (Highest Score Shaded)

	% Taking Test	Composite
Fredericksburg	63%	1482
Charlottesville	63%	1626
Manassas	39%	1458
Winchester	50%	1527
Staunton	56%	1444
Virginia	60%	1520
National	50%	1471

Source: The College Board, Virginia Department of Education, Garner Economics
[31] Based on feedback from a large majority of business sector participants, the local permitting process is considered onerous and inconsistent.
[32] Fredericksburg has a median property tax of $1,961, which is slightly higher than its benchmarks except for Manassas and Charlottesville, which are considerably higher. http://interactive.taxfoundation.org/propertytax/
[33] 33 listings of available properties of houses for sale beginning at $500k in ZIP code 22401, according to Zillow.com

[34] 89 listings of available properties of houses for sale from $250k-499,999 in ZIP code 22401, according to Zillow.com

[35] Metro-Level Cost-of-Living Index (2014)

	Composite	Grocery	Housing	Utilities	Transportation	Health Care	Misc. Goods & Services
Fredericksburg	121	112	161	98	121	94	98
Charlottesville	114	98	144	98	98	105	104
Manassas	114	112	139	98	121	94	98
Winchester	108	100	123	94	94	99	108
Staunton	94	91	91	105	91	94	95

Source: Areavibes.com, Garner Economics

[36] Crime Rates per 100,000 Residents, 2013
(Highest Relative Figure Shaded)

	Violent	Property
Fredericksburg	401.3	3991.4
Charlottesville	477.5	3329.0
Manassas	293.9	2021.1
Winchester	327.7	3703.6
Staunton	208.3	2490.9
Virginia	187.9	2065.9
United States Total	367.9	2730.7

Source: Federal Bureau of Investigation, Garner Economics

[37] Diverse options for the size of community. http://www.visitfred.com/listings/arts/performing-arts-theatre

[38] Limited river access and public input that many of the recreational opportunities are outside of the city. http://www.visitfred.com/packages/outdoor-lovers

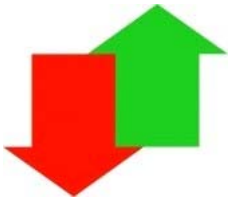
[39] Gateways into the city in some areas are not aesthetically pleasing

[40] According to *US News and World Report* rankings http://health.usnews.com/best-hospitals/area/va/mary-washington-hospital-6340290/rankings

[41] According to AAA, there are no four- or five-diamond properties in Fredericksburg. There are 1,336 hotel rooms in the City.

[42] Subjective opinion and based on feedback from the community engagement process.

CHAPTER 3: DASHBOARD INDICATORS SUMMARY



The following analysis examines the economic position and competitiveness of Fredericksburg, Virginia. For context, this report compares the City to itself over time, the nation, the Commonwealth of Virginia, and four peer cities: Charlottesville, Manassas, Winchester, and Staunton.

This analysis relies heavily on raw objective data collected by governmental or impartial third-party agencies. In all cases, the original and most current available data as of September 2015 are used. Garner Economics conducted all unique calculations and computations from the original data and will gladly share methodology with clients upon request.

Demographic & Labor Dynamics	
	Over the last decade, the total population of Fredericksburg has increased by 7,400 residents or 32.9%. The rate of growth is the highest among the four peer communities, Virginia, and the United States.
	From 2009-2013, Fredericksburg attracted 15.1% of its new residents from a *Different State*, which was higher than Manassas, Winchester, Staunton, and the United States but lower than Charlottesville and Virginia.
	Relative to the four peer communities, state, and nation, Fredericksburg has the lowest percentage of those classifying themselves as *White*. Fredericksburg has the highest percentage of those classifying themselves as *Black or African American*.
	Fredericksburg has the highest percentage of residents in the 15-19 age category compared to the four peer communities, state, and nation. Conversely, the City ties Charlottesville for the lowest percentage of those above age 55 at 18.7%. Staunton has the highest population of those over 55 at 34.5%.
	In 2013, Fredericksburg's violent crime rate was above the state and nation and second highest among peer communities. Fredericksburg had the highest property crime rate among the peer communities, state, and nation.

Demographic & Labor Dynamics	
	Fredericksburg has the highest proportion of those in the category *Some College, No Degree*. Conversely, the City has the lowest proportion of those in the *Less than 9th Grade* and the *9th to 12th Grade, No Diploma* categories. The proportion of those in the *Bachelor's Degree* and *Graduate or Professional Degrees* comes in third behind the state and Charlottesville.
	Fredericksburg's SAT composite score is above the national average for public schools and two peer communities (Manassas, Staunton) but below the state, Charlottesville, and Winchester. Fredericksburg ties Charlottesville in participation rate at 63% of seniors taking the test. The four-year graduation rate for Fredericksburg is above the nation but lower than the four peer communities and the state.
	Among new residents ages 25 and over, Fredericksburg attracts the most with *Some College or Associate's Degree* compared to the benchmarks, state, and nation. Fredericksburg also attracts the third highest percentage of those with *Bachelor's Degrees* behind Charlottesville and the nation.
	Among residents ages 25 and over, Fredericksburg has higher median earnings than the benchmarks, state, or nation for the category *Bachelor's Degree*.
	Ten percent of the total workforce in Fredericksburg also lives within the area, though the number has increased by 333 or 16.8%.
	From 2003 to 2012, the number of workers *Living in Fredericksburg but Employed Outside (out-commuters)* increased by 66.2% or 3,530 more workers. The number of workers *Employed in Fredericksburg but Living Outside (in-commuters)* increased as well, up 12.8% or 2,359 more workers. The mean travel time to work is 25 minutes.
	The numbers of active residential workers in the 30-mile and 45-mile drive time labor draw have grown over the past 10 years, both growing around 1% annually.

Economic Dynamics	
	In 2014, the estimated average weekly wage in Fredericksburg was $782, which is the second lowest among the peer communities (Staunton is the lowest), 25% below the state, and 21% below the national average. The average value does not include those workers who live in Fredericksburg but work outside the area. The average annual wage for all Fredericksburg residents reported by the Census Bureau for 2011 to 2013 is much higher at a value of $69,027.
	The per capita income in Fredericksburg was $28,212 in 2013, which was higher than the peer communities and the nation but below the state average of $33,103.
	In 2013, 6.6% of workers in Fredericksburg were self-employed. The proportion is lower than three of the benchmark communities, the state and the nation.
	Median earnings among Fredericksburg workers classified as *Self-Employed in Own Incorporated Business* were $51,467, which is near the highest relative value of $51,600 in Winchester. Median earnings among those Fredericksburg workers classified as *Self-Employed in Own Not Incorporated Business* were the highest among the peer communities, state, and nation at $23,720.
	Fredericksburg's current total of new startup firms, an indicator of entrepreneurial activities, is half the number of the peak in 2005.
	Among residents ages 16 and over in Fredericksburg, 60.7% are employed, which is higher than three of the benchmark communities (Charlottesville, Winchester, and Staunton), the state, and the nation. Fredericksburg's unemployment rate is above the state average but lower than the national average. Among peer communities, Fredericksburg has the second highest unemployment rate.
	Fredericksburg's proportion of families with two income earners is 35.3%, which is the lowest proportion compared to the four benchmark communities, the state, and nation. Fredericksburg did have the highest proportion of unmarried females in the labor force at 24.9%.
	Compared to the nation and the state, Fredericksburg has the total highest share of households with incomes in the $35,000 to $49,999 category. Fredericksburg's proportion of those above $75,000 is 30.9%, which is below the state average of 42.4% and the national average of 34.1%.
	Fredericksburg's industry employment percentages are highest in two sectors: *Real Estate and Rental and Leasing* and *Accommodation and Food Services*. Conversely, Fredericksburg has the lowest percentage of employment in six sectors.

Economic Dynamics	
	The 2014 composite cost-of-living index for Fredericksburg is estimated to be 121 (the national average is set at 100). Compared to the benchmark communities, Fredericksburg has the overall highest cost of living and highest housing costs.
	Households in Fredericksburg have the lowest availability (access) to DSL compared to the four peer communities, state, and nation. Fredericksburg's cable availability value of 86.1% is above the state average of 79.5% and just slightly below the national availability of 88.8%. Charlottesville has the highest availability to cable at 97.5%. With respect to download speeds, Fredericksburg's medium & large businesses experience higher median download speeds than Manassas, Winchester, the state, and nation.
	Overall, Fredericksburg's average percentage of leakage is 31%, indicating that shoppers from Fredericksburg spend nearly 70% of all dollars in the region.

Local Specialization, Competitiveness & Growth

Below are general observations from an in-depth analysis of industry sectors and occupational groups in Fredericksburg. This information is not benchmarked:

- ✓ Job growth in the past five years in Fredericksburg has been led by *Government*, which added 194 jobs (+5 percent), *Educational Services*, which added 93 jobs (+36 percent), and *Real Estate and Rental and Leasing*, which added 55 jobs (+13 percent).
- ✓ There were significant job losses in five sectors: *Health Care and Social Assistance* (-260 jobs/4 percent); *Manufacturing* (-169 jobs/39 percent); *Professional, Scientific, and Technical Services* (-166 jobs/15 percent); *Wholesale Trade* (-156 jobs/29 percent); and *Other Services*
- ✓ (-146 jobs/13 percent).
- ✓ Industrial average earnings in Fredericksburg are below the national average in all major sectors except for *Health Care and Social Assistance* (18.1 percent higher) and *Construction* (3.9 percent higher).
- ✓ Sectors with the greatest imbalance in earnings relative to national averages were: *Management of Companies and Enterprises* (71.8 percent lower); *Information* (70.9 percent lower); *Manufacturing* (67.5 percent lower); *and Arts, Entertainment & Recreation* (138.8 percent lower).
- ✓ Over the last five years, the single largest absolute occupational gains in Fredericksburg came from *Education, Training, and Library Occupations,* up 183 jobs or 16 percent.
- ✓ Fredericksburg's median hourly earnings were above the nation for all occupations except for *Military*, *Sales and Related*, and *Transportation and Material Moving*.
- ✓ There are two industry sectors in Fredericksburg with both high local specialization and growth in the past five years: *Government* and *Real Estate and Rental and Leasing.*
- ✓ The two emerging industry sectors in Fredericksburg (low local specialization + recent growth) are *Educational Services* and *Finance and Insurance.*
- ✓ The strongest net local competitive effect was from: *Government*. The region had negative local competitive effects in 15 sectors, including *Health Care and Social Assistance, Accommodation and Food Services,* and *Retail Trade.*
- ✓ Two occupations had local specialization and recent growth: *Healthcare Practitioners and Technical* and *Military*. Six occupations with high local specialization are at-risk due to job losses over the past five years.

CHAPTER 4: DEMOGRAPHIC & LABOR DYNAMICS

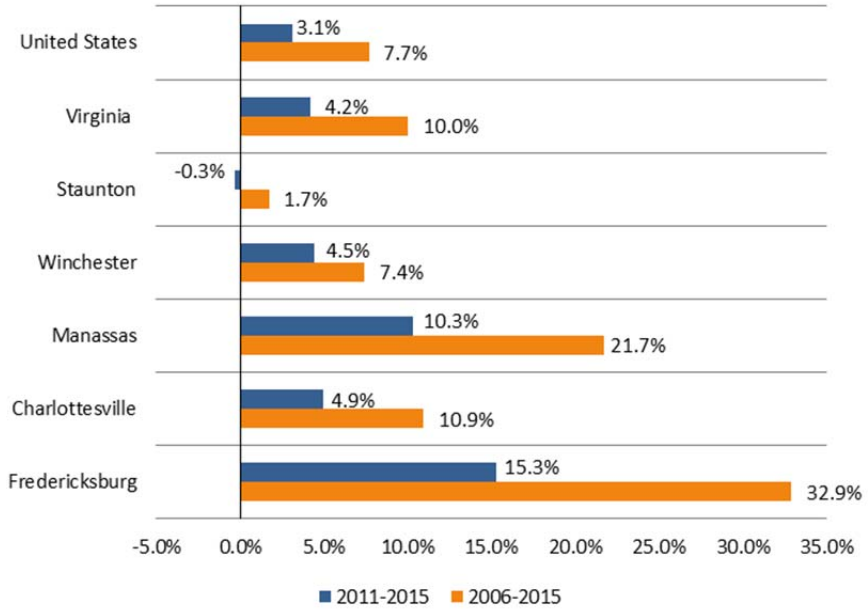
Population Growth

The rate of population growth can be a significant factor in local economic health and is often a key consideration in business expansion and site-selection decisions. Most firms are wary of areas with population declines, very slow growth rates, or significant amounts of domestic out-migration.

Fredericksburg's population has grown by 7,400 over the past decade from a total of 22,477 in 2006 to 29,877 in 2015. At 32.9 percent, the city's growth rate over the past decade far exceeds the nation, Virginia, and the four peer communities (Figure 2 and Table 1).

Fredericksburg's annual growth rate peaked between 2010 and 2011 with a 5.9 percent annual growth rate (Figure 3). The five-year annual rate of population growth in Fredericksburg has been 3.1 percent, while over 10 years, the rate averaged 3.3 percent (Table 2).

Figure 2
Net Population Change



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Source: EMSI, Garner Economics

Table 2
Net Population Change
Highest Relative Figure Shaded.

	2015 Population	2011-2015 5-Year Change	5-Year Percent Change	2006-2015 10-Year Change	10-Year Percent Change
Fredericksburg	29,877	3,969	15.3%	7,400	32.9%
Charlottesville	45,553	2,139	4.9%	4,493	10.9%
Manassas	43,371	4,049	10.3%	7,741	21.7%
Winchester	27,663	1,181	4.5%	1,907	7.4%
Staunton	24,047	-73	-0.3%	409	1.7%
Virginia	8,443,542	338,351	4.2%	769,811	10.0%
United States	321,348,861	9,761,045	3.1%	22,968,949	7.7%

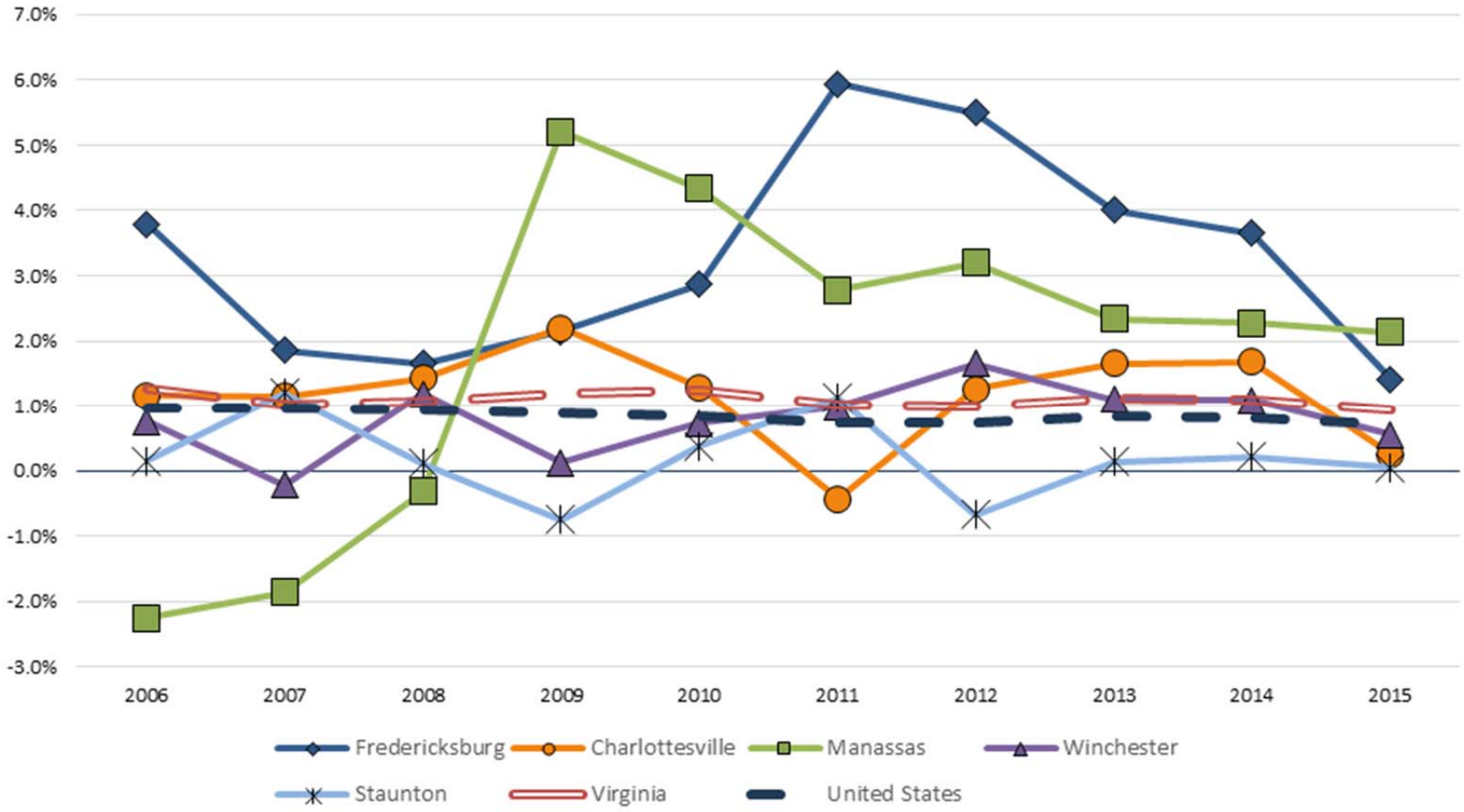
Source: EMSI, Garner Economics

Table 1
Average Annual Rate of Population Change

	5-Year	10-Year
Fredericksburg	3.1%	3.3%
Charlottesville	1.0%	1.1%
Manassas	2.1%	2.2%
Winchester	0.9%	0.7%
Staunton	-0.1%	0.2%
Virginia	0.8%	1.0%
United States	0.6%	0.8%

Source: EMSI, Garner Economics

Figure 3
Annual Rate of Population Change

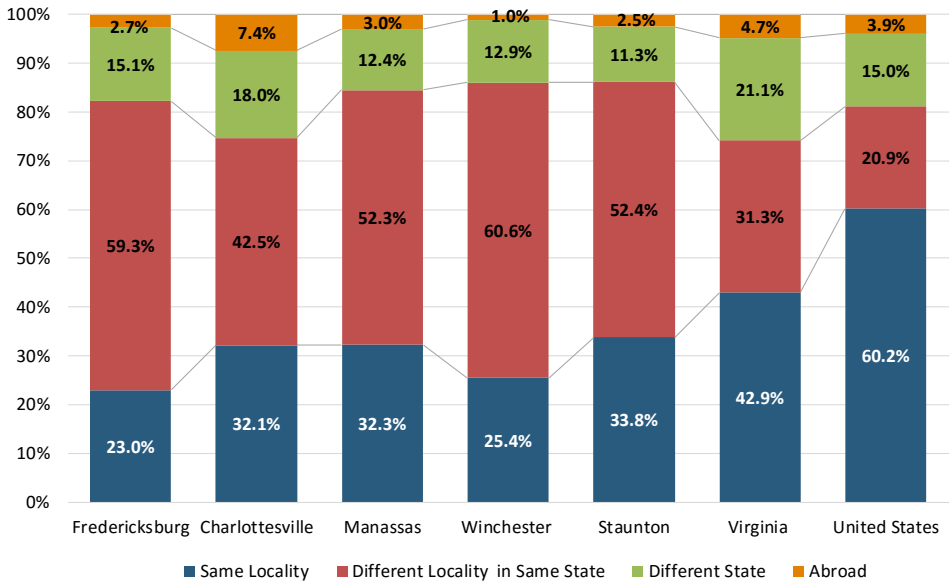


Source: EMSI, Garner Economics

Sources of New Residents

Attracting new residents from a diversity of outside locations can reflect a community's broader appeal and provide an indicator of economic dynamism to businesses. From 2009 to 2013, Fredericksburg attracted 59.3 percent of its new residents from a *Different Locality in Same State*, second only to Winchester in terms of peer communities and much higher than both the state and national average (Figure 4 and Table 3). Fredericksburg attracted 15 percent from a *Different State*, which is right in line with the national average but below the state and Charlottesville. Around 3 percent of Fredericksburg's new residents came from *Abroad*, a proportion just slightly below the state's average of 4.7 percent and the national average near 4 percent.

Figure 4
2009-2013 Five-Year Estimate
Previous Location of Residents That Had Moved One Year Earlier



Source: US Census Bureau, Garner Economics

Table 3
2009-2013 Five-Year Estimate
Previous Location of Residents That Had Moved One Year Earlier
Highest Relative Figure Shaded.

	Fredericksburg	Charlottesville	Manassas	Winchester	Staunton	Virginia	United States
Same Locality	23.0%	32.1%	32.3%	25.4%	33.8%	42.9%	60.2%
Different Locality in Same State	59.3%	42.5%	52.3%	60.6%	52.4%	31.3%	20.9%
Different State	15.1%	18.0%	12.4%	12.9%	11.3%	21.1%	15.0%
Abroad	2.7%	7.4%	3.0%	1.0%	2.5%	4.7%	3.9%

Source: US Census Bureau, Garner Economics

Population by Race and Hispanic Origin

By itself, racial diversity is not a determinant factor in local economic competitiveness, although some firms may prefer higher rates of diversity in order to attract and retain certain workers. This is particularly true for multinational firms looking to attract workers from outside the United States.

Relative to the four peer communities, state, and nation, Fredericksburg has the lowest percentage of those classifying themselves as *White*. Fredericksburg has the highest percentage of those classifying themselves as *Black or African American*. Fredericksburg's percentage of those classifying themselves as *Hispanic* is lower than the nation but higher than the state, Staunton, and Charlottesville (Table 4).

Table 4
Race & Hispanic Origin by Percentage of Total Population, 2015
(Highest Relative Figure Shaded)

	Fredericksburg	Charlottesville	Manassas	Winchester	Staunton	Virginia	United States
White	67.0%	70.4%	72.7%	82.1%	83.7%	70.4%	77.3%
Black or African American	25.0%	18.6%	16.1%	11.0%	12.3%	19.7%	13.2%
Asian	3.5%	6.9%	5.8%	2.8%	1.2%	6.4%	5.4%
Two or more races	3.7%	3.6%	3.7%	3.1%	2.5%	2.9%	2.5%
American Indian and Alaska Native	0.8%	0.4%	1.4%	0.9%	0.3%	0.6%	1.3%
Native Hawaiian and Other Pacific Islander	0.1%	0.1%	0.2%	0.1%	0.0%	0.1%	0.2%
Hispanic Or Latino (of any race)	11.9%	5.3%	34.3%	17.8%	3.0%	9.1%	17.8%

Source: EMSI 2015 Q2, Garner Economics

Age

The age composition of a local population can be an important determinant in business decisions and competitiveness. The lack or underrepresentation of younger workers may deter firms from considering some communities for their long-term plans. Low proportions of middle-age workers may prevent firms from initiating expansions requiring quick startup operations. A high proportion of older workers may indicate certain incumbent skills or the need to replace soon-to-retire workers.

Fredericksburg has the highest percentage of residents in the 15-19 age category. Both Fredericksburg and Charlottesville have higher percentages of those in the 20-24 category due to the presence of universities (Table 5, Figure 5, and Figure 6). Fredericksburg has the lowest proportion of residents in the 60-64 age category.

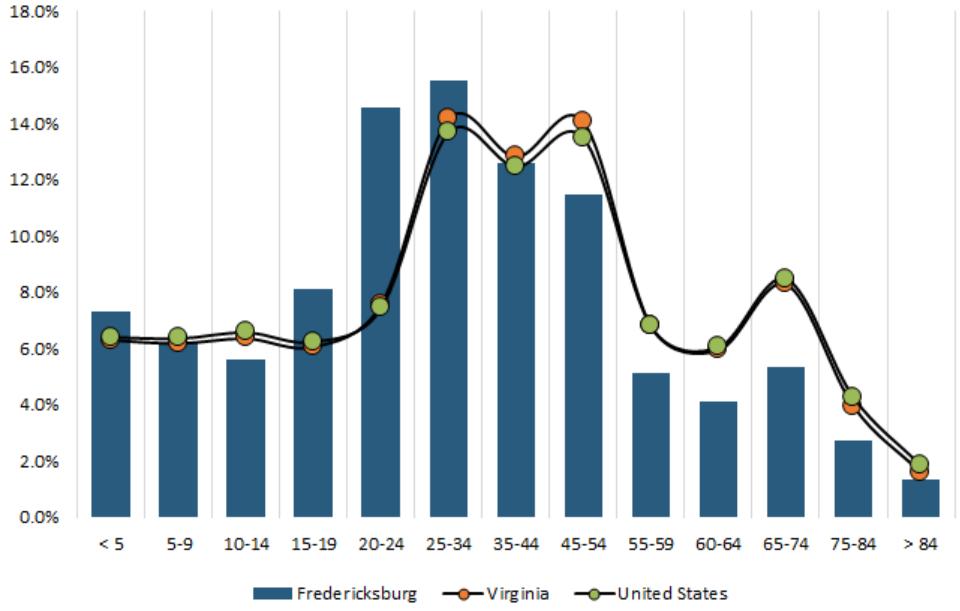
Table 5
Age Groups by Percentage of Total Population, 2015
(Highest Relative Figure Shaded)

	Fredericksburg	Charlottesville	Manassas	Winchester	Staunton	Virginia	United States
< 5	7.3%	5.2%	8.5%	6.9%	5.9%	6.3%	6.4%
5-9	6.2%	4.2%	7.1%	6.3%	5.5%	6.2%	6.4%
10-14	5.6%	3.6%	7.5%	6.5%	5.1%	6.4%	6.6%
15-19	8.1%	7.7%	6.4%	6.6%	5.5%	6.1%	6.2%
20-24	14.5%	21.5%	7.1%	8.8%	6.6%	7.6%	7.4%
25-34	15.5%	18.5%	16.2%	14.6%	13.1%	14.2%	13.7%
35-44	12.6%	10.9%	14.4%	11.5%	11.3%	12.8%	12.5%
45-54	11.5%	9.6%	13.2%	12.5%	12.4%	14.0%	13.5%
55-59	5.1%	4.8%	6.2%	6.3%	6.9%	6.8%	6.8%
60-64	4.1%	4.6%	4.9%	5.7%	6.8%	5.9%	6.0%
65-74	5.3%	5.6%	5.3%	7.8%	11.1%	8.3%	8.5%
75-84	2.8%	2.6%	2.2%	4.4%	6.7%	3.9%	4.3%
> 84	1.3%	1.1%	1.0%	2.2%	3.0%	1.6%	1.8%

Source: EMSI 2015 Q2, Garner Economics

Figure 5

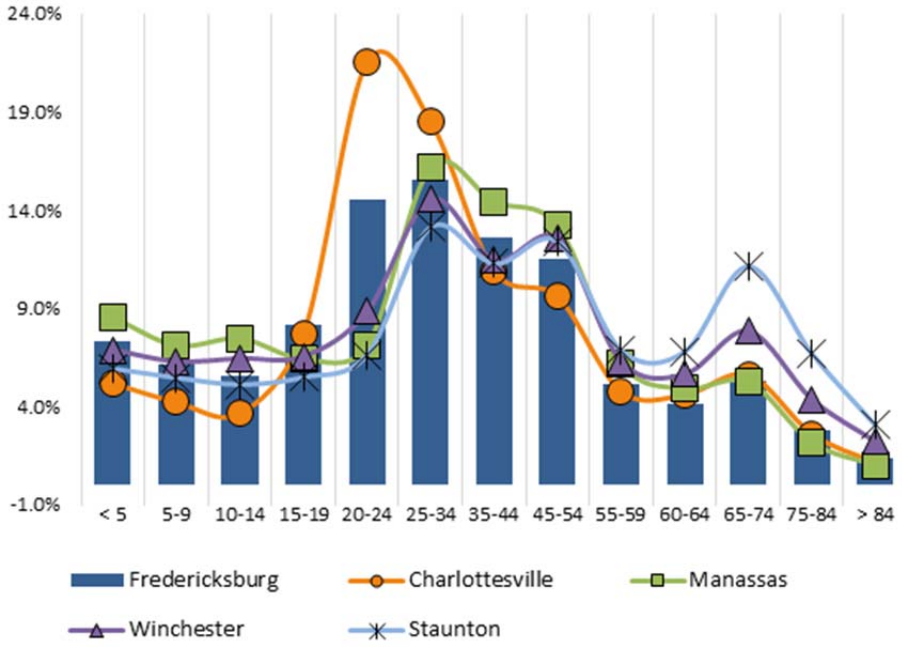
2015 Age Groups by Percentage of Total Population



Source: EMSI, Garner Economics

Figure 6

2015 Age Groups by Percentage of Total Population



Source: EMSI, Garner Economics

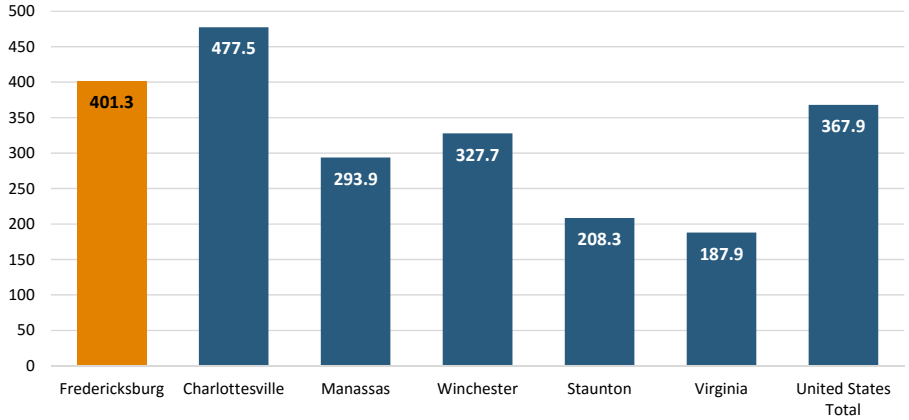
Crime

Crime rates may seem outside the typical measures of economic competitiveness, but they represent a widely accepted objective gauge used by firms. Crime rates generally reflect underlying economic conditions and may signal deeper systemic problems better than standard economic measures.

In 2013, Fredericksburg's violent crime rate was above the state and nation and second highest among peer communities. (Figure 7 and Table 6). Fredericksburg had the highest property crime rate among the peer communities, state, and nation (Figure 8 and Table 6).

Figure 5

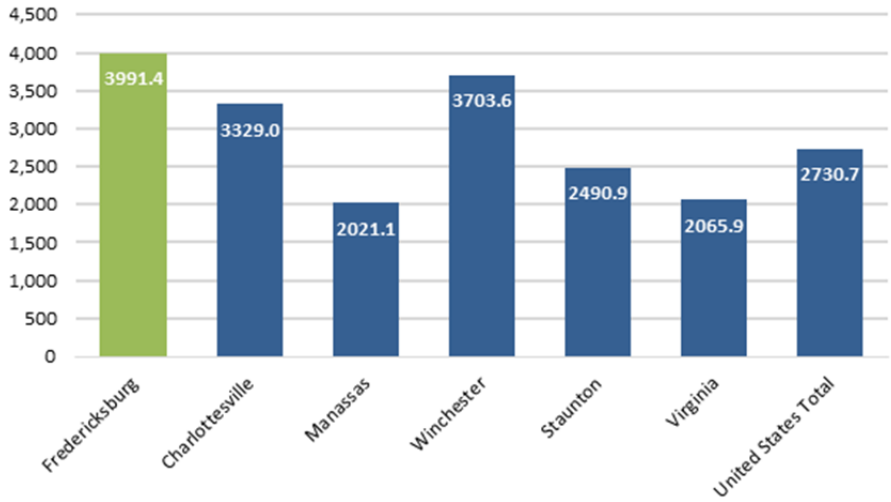
Violent Crime Rates per 100,000 Residents, 2013



Source: Federal Bureau of Investigation, Garner Economics

Figure 6

Property Crime Rates per 100,000 Residents, 2013



Source: Federal Bureau of Investigation, Garner Economics

Table 6

Crime Rates per 100,000 Residents, 2013

(Highest Relative Figure Shaded)

	Violent	Property
Fredericksburg	401.3	3991.4
Charlottesville	477.5	3329.0
Manassas	293.9	2021.1
Winchester	327.7	3703.6
Staunton	208.3	2490.9
Virginia	187.9	2065.9
United States Total	367.9	2730.7

Source: Federal Bureau of Investigation, Garner Economics

Educational Attainment

Increasingly, the level of education of a community's population is becoming a decisive factor in economic competitiveness. Firms understand the need to operate in economies that offer a sufficient supply of workers that meet or exceed their demands. They also know that the lack of an educated workforce can significantly affect business performance.

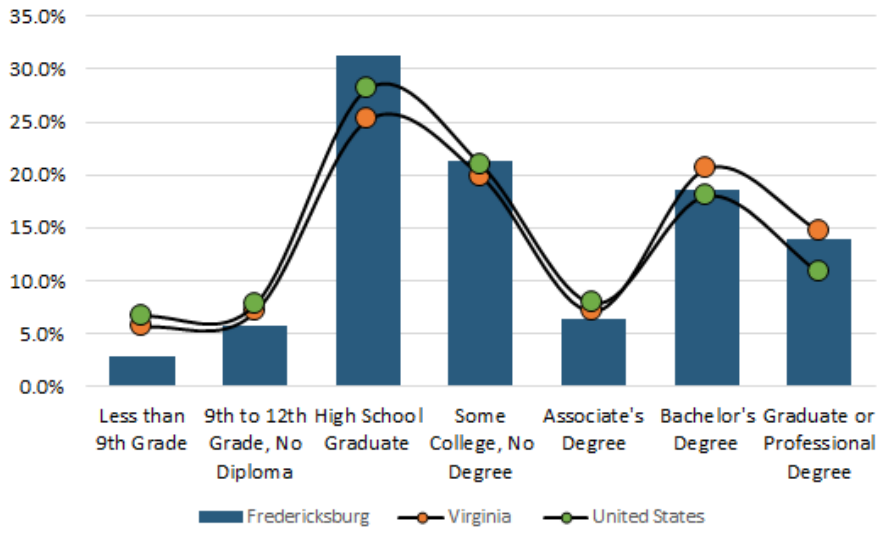
Fredericksburg has the highest proportion of those in the category *Some College, No Degree.* Conversely, the city has the lowest proportion of those in the *Less than 9th Grade* and the *9th to 12th Grade, No Diploma* categories. The proportion of those in the *Bachelor's Degree* and *Graduate or Professional Degrees* is lower than the state average but higher than the national average and the averages for Manassas, Winchester, and Staunton. Both Fredericksburg and Charlottesville have universities, which do increase the population of those with bachelor's degrees or higher.

Table 7
Educational Attainment, Percentage Total Population, 2015
(Highest Relative Figure Shaded)

	Fredericksburg	Charlottesville	Manassas	Winchester	Staunton	Virginia	United States
Less than 9th Grade	2.8%	4.6%	11.9%	8.3%	4.9%	5.6%	6.6%
9th to 12th Grade, No Diploma	5.8%	5.6%	7.1%	9.6%	8.8%	7.0%	7.7%
High School Graduate	31.2%	23.0%	27.7%	30.7%	34.4%	25.2%	28.2%
Some College, No Degree	21.3%	13.7%	18.8%	17.7%	18.5%	19.9%	21.0%
Associate's Degree	6.4%	2.4%	7.1%	7.9%	6.7%	7.1%	7.8%
Bachelor's Degree	18.5%	22.0%	17.5%	16.3%	16.2%	20.6%	18.0%
Graduate or Professional Degree	13.9%	28.7%	9.8%	9.4%	10.4%	14.7%	10.7%

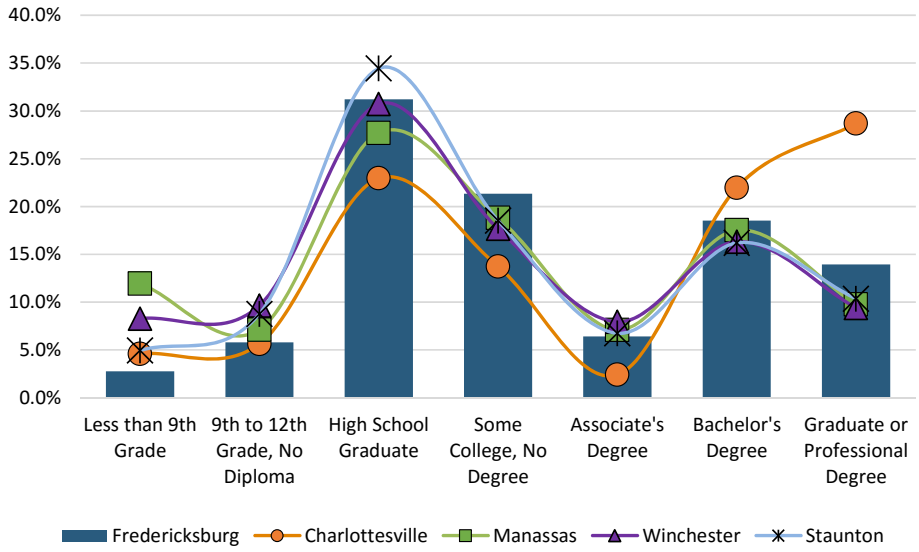
Source: EMSI, Garner Economics

Figure 8
Educational Attainment, Percentage Total Population Age 25+
2015



Source: EMSI, Garner Economics

Figure 7
Educational Attainment, Percentage Total Population Age 25+
2015



Source: EMSI, Garner Economics

Secondary School Performance

SAT Scores

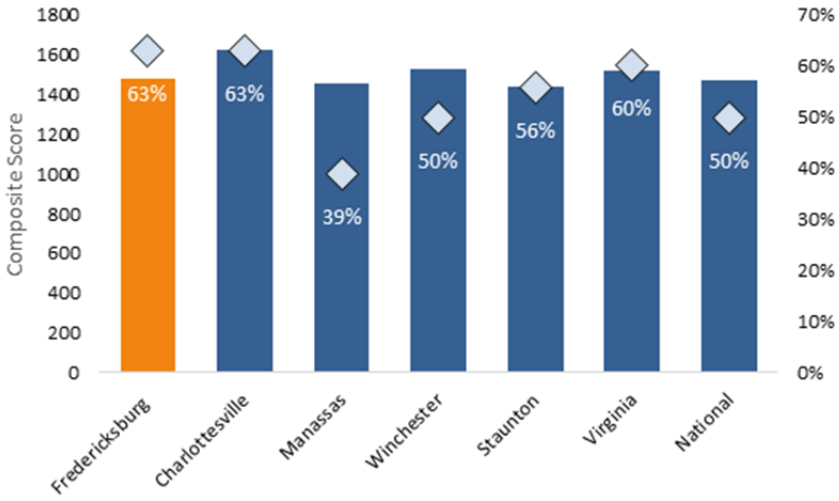
The SAT exams are standardized tests for college admissions in the United States and a widely accepted measure of education quality. Both scores are especially relevant to businesses because they provide a measure of the "final product" of public schools and the educational quality of those entering the workforce. Fredericksburg's composite score is above the national average for public schools and two peer communities (Manassas, Staunton) but below the state, Charlottesville, and Winchester. Fredericksburg ties Charlottesville in participation rate at 63 percent of seniors taking the test.

Table 8
2014 Public School SAT Scores (Highest Score Shaded)

	% Taking Test	Composite
Fredericksburg	63%	1482
Charlottesville	63%	1626
Manassas	39%	1458
Winchester	50%	1527
Staunton	56%	1444
Virginia	60%	1520
National	50%	1471

Source: The College Board, Virginia Department of Education, Garner Economics

Figure 9
2014 SAT Scores



Source: The College Board, Virginia Department of Education, Garner Economics

High School Graduation Rates

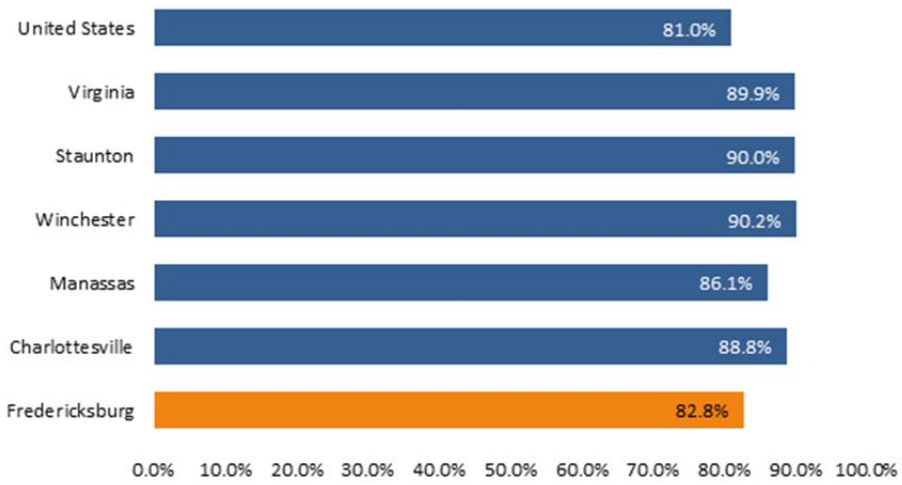
The share of high school students graduating within four years of beginning 9th grade is another important measure of the performance of local school districts. The four-year graduation rate for Fredericksburg is above the nation but lower than the four peer communities and the state (Figure 12 and Table 9).

Table 9
2014 4-Year Cohort High School Graduation Rates
(Highest Score Shaded)

Fredericksburg	82.8%
Charlottesville	88.8%
Manassas	86.1%
Winchester	90.2%
Staunton	90.0%
Virginia	89.9%
United States	81.0%

Source: Virginia Department of Education, National Center for Education Statistics (NCES) for US (2011-2012, the most recent year available)

Figure 10
2014 4-Year Cohort High School Graduation Rates



Source: Virginia Department of Education, National Center for Education Statistics (NCES) for US (2011-2012, the most recent year available)

Population In-Migration by Educational Attainment

Among new residents ages 25 and over, Fredericksburg attracts the most with *Some College or Associate's Degree* compared to the benchmarks, state, and nation (Figure 13 and Table 10). Fredericksburg also attracts a higher volume of those with *Bachelor's Degrees* than Manassas, Winchester, Staunton, and the nation but lower than Charlottesville and the state. Charlottesville is skewed by the presence of the University of Virginia.

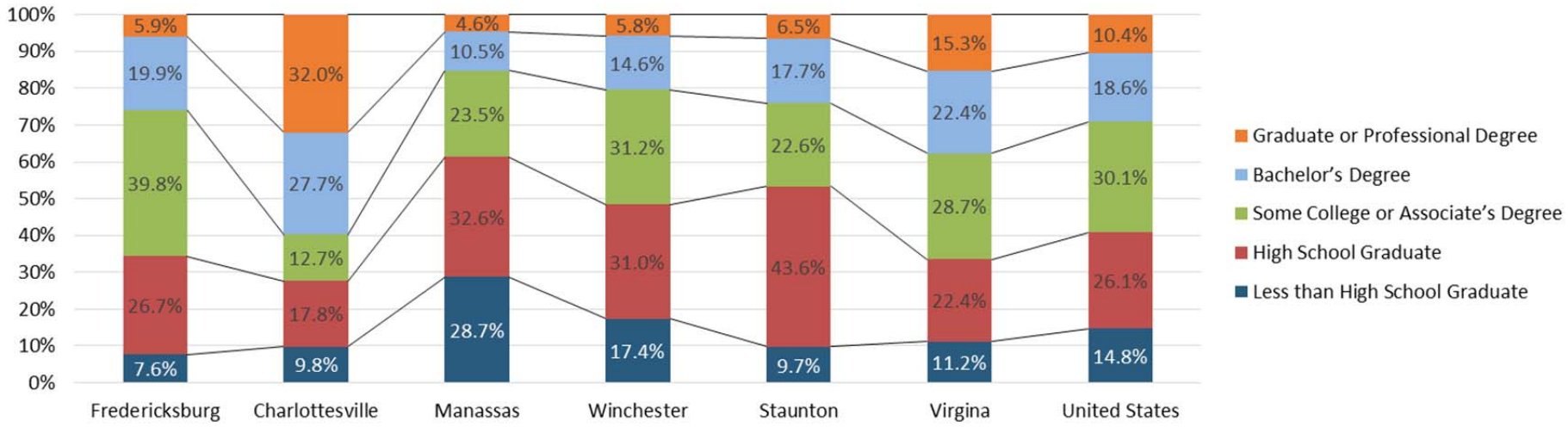
Table 10
Educational Attainment by Percentage of New Resident Population
Ages 25 and over
2011-2013 Three Year Estimates
(Highest Percentages Shaded)

	Fredericksburg	Charlottesville	Manassas	Winchester	Staunton	Virginia	United States
Less than High School	7.6%	9.8%	28.7%	17.4%	9.7%	11.2%	14.8%
High School Graduate	26.7%	17.8%	32.6%	31.0%	43.6%	22.4%	26.1%
Some College or Associate's Degree	39.8%	12.7%	23.5%	31.2%	22.6%	28.7%	30.1%
Bachelor's Degree	19.9%	27.7%	10.5%	14.6%	17.7%	22.4%	18.6%
Graduate or Professional Degree	5.9%	32.0%	4.6%	5.8%	6.5%	15.3%	10.4%

Source: US Census Bureau, Garner Economics

Figure 11

Educational Attainment by Percentage of New Resident Population
Ages 25 and over
2011-2013 Three-Year Annual Estimates



Source: US Census Bureau, Garner Economics

Median Earnings by Educational Attainment

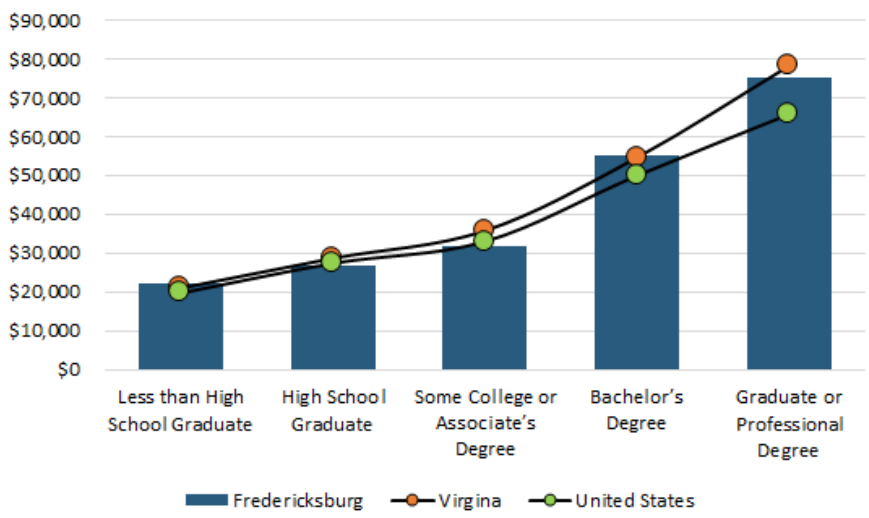
Among residents ages 25 and over, Fredericksburg has higher median earnings than the benchmarks, state, or nation for the category *Bachelor's Degree* (Table 11, Figure 14 & Figure 15). Earnings for those in the category *Some College or Associate's Degree* are below the state and national average but in line with Charlottesville and above Staunton. Fredericksburg does have the second highest median earnings for those with a *Graduate or Professional Degree*, with only the state reporting higher median earnings.

Table 11
2011-2013 Three-Year Estimates
Median Earnings by Educational Attainment, Ages 25+
Highest Relative Number Shaded

	Fredericksburg	Charlottesville	Manassas	Winchester	Staunton	Virginia	United States
Less than High School	$22,160	$20,879	$27,328	$17,829	$18,337	$20,968	$19,668
High School Graduate	$26,882	$25,281	$31,727	$26,755	$22,696	$28,667	$27,346
Some College or Associate's Degree	$31,687	$31,262	$36,709	$32,544	$29,158	$35,762	$32,995
Bachelor's Degree	$55,024	$36,588	$46,359	$43,297	$40,404	$54,639	$49,964
Graduate or Professional Degree	$75,000	$55,424	$61,682	$57,663	$47,833	$78,269	$65,791

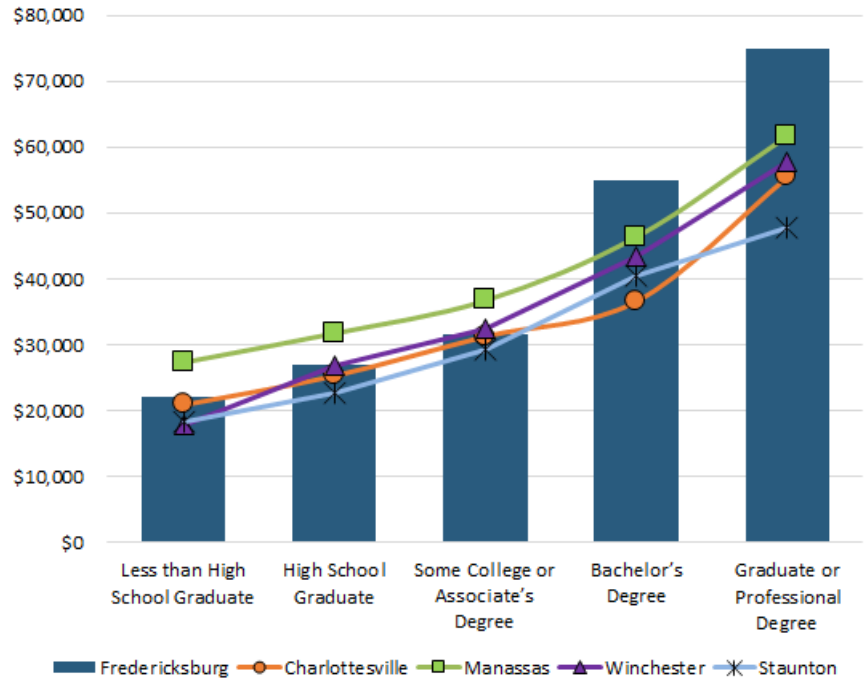
Source: US Census Bureau, Garner Economics

Figure 13
2011-2013 Three-Year Estimates
Median Earnings by Educational Attainment, Ages 25+



Source: US Census Bureau, Garner Economics

Figure 12
2011-2013 Three-Year Estimates
Median Earnings by Educational Attainment, Ages 25+



Source: US Census Bureau, Garner Economics

Worker Flows

Worker flows help define the size of a local economy's labor draw, and trends help describe attraction and regional competition. Worker flows represent both daily commuters and short-term away-from-home assignments (major construction projects, on-site consulting, etc.).

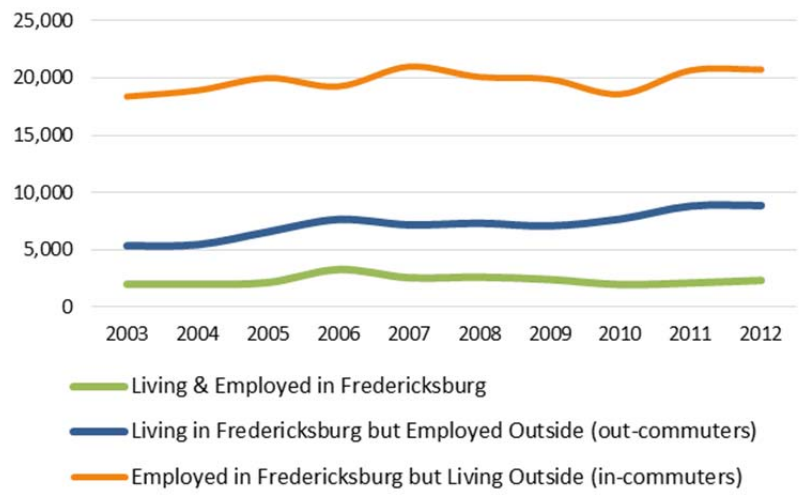
In 2012, of those working in Fredericksburg, 2,310 (or 10 percent of the total workforce) also lived in Fredericksburg. The other 20,744 resident workers in Fredericksburg (90 percent of the total) traveled to the area for employment (in-commuters) (Figure 16 and Table 12).

Between 2003 and 2012, the number and proportion of workers *Living and Employed in Fredericksburg* increased by 16.8 percent, with 333 more workers fitting this description (Figure 16 and Table 12). Over the same period, the number of workers *Living in Fredericksburg but Employed Outside (out-commuters)* increased by 66.2 percent or 3,530 more workers. The number of workers *Employed in Fredericksburg but Living Outside (in-commuters)* increased as well, up 12.8 percent or 2,359 more workers.

Among Fredericksburg residents who work elsewhere, the leading destination is Stafford County, where 1,396 area residents (12.5 percent) commute to work (Table 13). The leading location where in-commuters to Fredericksburg live is Spotsylvania County, Virginia, with 7,079 residents who work in Fredericksburg (Table 14).

The mean travel to work (one way) is 25 minutes. However, 12.2 percent of the workforce drives 60 minutes or more each way.

Figure 14
*Fredericksburg Worker Flows**



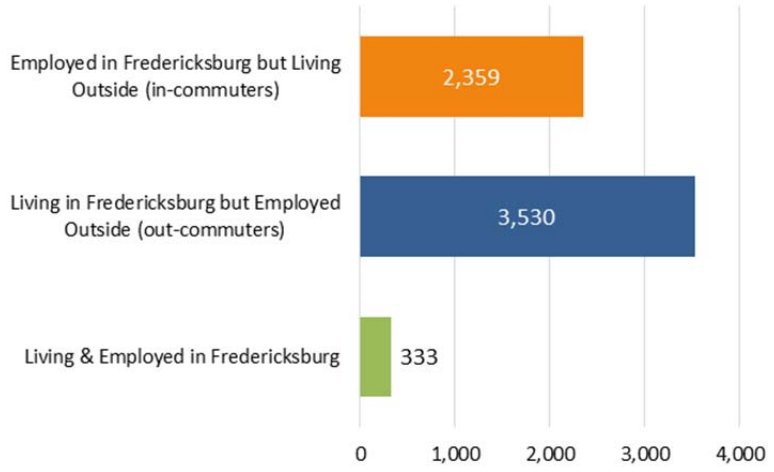
*The Census Bureau counts one primary job per worker.

Table 12
*Fredericksburg Worker Flows**

	2003	2012	2002-2012 Change	
Living & Employed in Fredericksburg	1,977	2,310	333	16.8%
Living in Fredericksburg but Employed Outside (out-commuters)	5,325	8,855	3,530	66.2%
Employed in Fredericksburg but Living Outside (in-commuters)	18,385	20,744	2,359	12.8%

**The Census Bureau counts one primary job per worker.*
Source: US Census Bureau, Garner Economics

Figure 15
*Fredericksburg Worker Flows**
2003-2012 Change



**The Census Bureau counts one primary job per worker.*
Source: US Census Bureau, Garner Economics

Table 13
Where Workers who Live in Fredericksburg are Employed
Top Ten Counties 2012

County	Number	Percent
Fredericksburg City, VA	2,310	20.7%
Stafford County, VA	1,396	12.5%
Spotsylvania County, VA	1,361	12.2%
Fairfax County, VA	1,027	9.2%
Prince William County, VA	565	5.1%
Henrico County, VA	369	3.3%
District of Columbia, DC	336	3.0%
Richmond city, VA	294	2.6%
Loudoun County, VA	218	2.0%
Chesterfield County, VA	208	1.9%

Source: US Census Bureau, Garner Economics

Table 14
Where Workers who are Employed in Fredericksburg Live
Top Ten Counties 2012

County	Number	Percent
Spotsylvania County, VA	7,079	30.7%
Stafford County, VA	3,881	16.8%
Fredericksburg City, VA	2,310	10.0%
Caroline County, VA	872	3.8%
Prince William County, VA	779	3.4%
King George County, VA	722	3.1%
Fairfax County, VA	647	2.8%
Orange County, VA	557	2.4%
Loudoun County, VA	532	2.3%
Henrico County, VA	325	1.4%

Source: US Census Bureau, Garner Economics

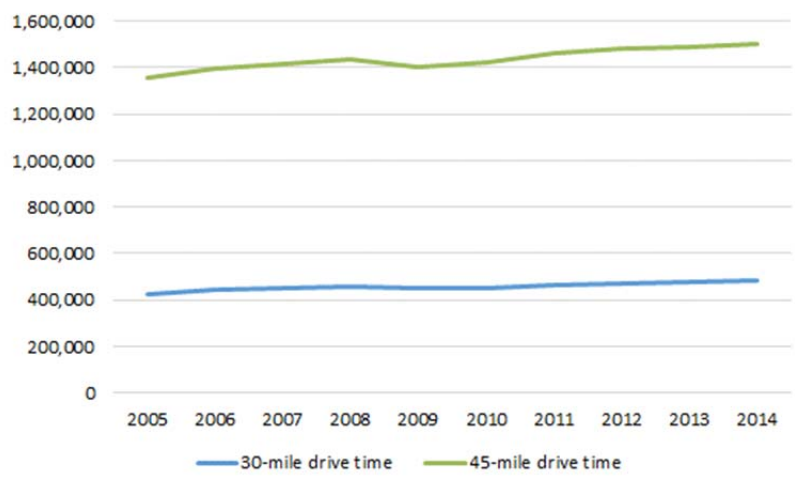
Effective Labor Draw

The effective labor draw considers the documented labor pool for a particular geographic location based on the existing residential workforce and local road network. The analysis considers the pool of active workers residing within representative drive time radiuses from a site. The analysis does not rely on broad aggregates, but instead, on actual demonstrated worker behavior within the established street and highway system.

According to a calculation of a 45-mile drive time from Fredericksburg, the US Census Bureau estimates a total active residential workforce[xliii] of 1,499,711 persons as of 2014 (see Figure 19 and Table 15). A more constrained 30-mile drive time from the site shows a total active residential workforce of 1,354,773 persons.

The number of active residential workers in the 45-mile and 30-mile drive time labor draw areas has grown over the last 10 years. The average annual change was 1.1 percent within the 45-mile drive time area, with a total increase of 144,938 workers overall. Within the 30-mile drive time area, the average annual change was 1.3 percent, with a 55,504 worker increase over 10 years. (See Figure 19 and Table 15).

Figure 16
Active Residential Workforce
Ten-Year History



Source: STATS Indiana, Garner Economics

Figure 17
Effective Labor Draw

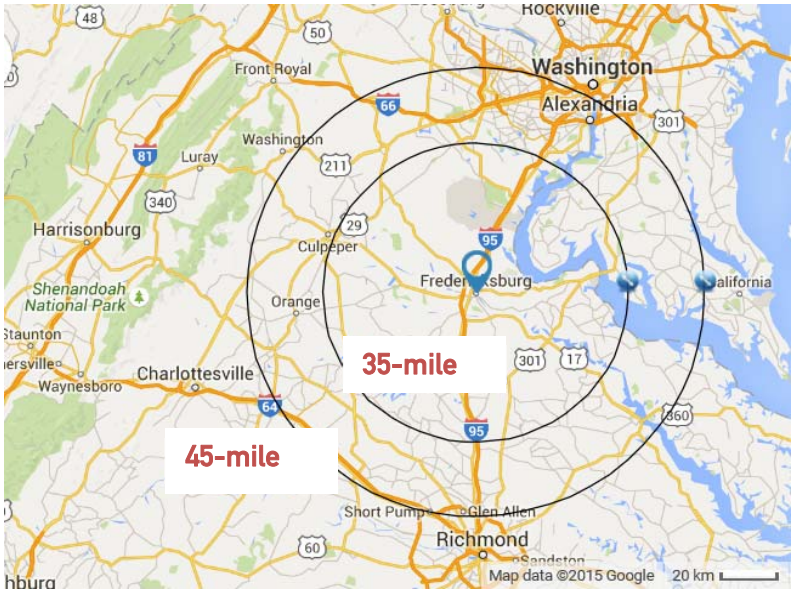


Table 15
Change in Active Residential Workforce

	2005	2014	2005-2014 Change
30-mile drive time	425,355	1,354,773	55,504
45-mile drive time	480,859	1,499,711	144,938

Source: STATS Indiana, Garner Economics

CHAPTER 5: ECONOMIC DYNAMICS

Estimated Average Weekly Wage

In 2014, the estimated average weekly wage per job in Fredericksburg equaled $782[xliv] and the average annual wage equaled $40,680. The average value does not include those workers who live in Fredericksburg but work outside the area. The average annual wage for all Fredericksburg residents reported by the Census Bureau for 2011 to 2013 is much higher at a value of $69,027.

Fredericksburg's wage average per job is the second lowest among the peer communities, with the lowest in Staunton. The figure is also nearly 25 percent below the state and 21 percent below the nation (Figure 20 and Table 16).

Over the last decade (2005-2014), the estimated average weekly wage in Fredericksburg increased by $158 or 25.3 percent. This is right around the state increase of 25.2 percent but below the increase for the four benchmark communities and the nation (Figure 21, Figure 22, and Table 16).

Table 16

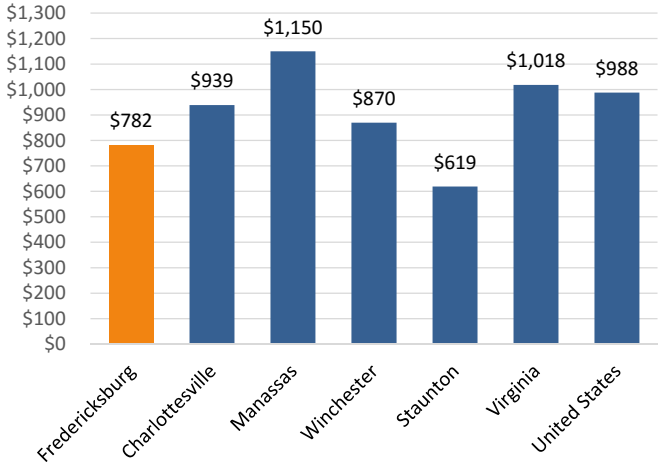
2005-2014 Change in Estimated Average Weekly Wage
Highest Relative Number Shaded

	2014	2005-2014	
	Per Job	$	%
Fredericksburg	$782	$158	25.3%
Charlottesville	$939	$231	32.6%
Manassas	$1,150	$239	26.2%
Winchester	$870	$198	29.5%
Staunton	$619	$127	25.8%
Virginia	$1,018	$205	25.2%
United States	$988	$262	36.1%

Source: Bureau of Labor Statistics, Garner Economics

Figure 18

Estimated Average Weekly Wage 2014



Source: Bureau of Labor Statistics, Garner Economics

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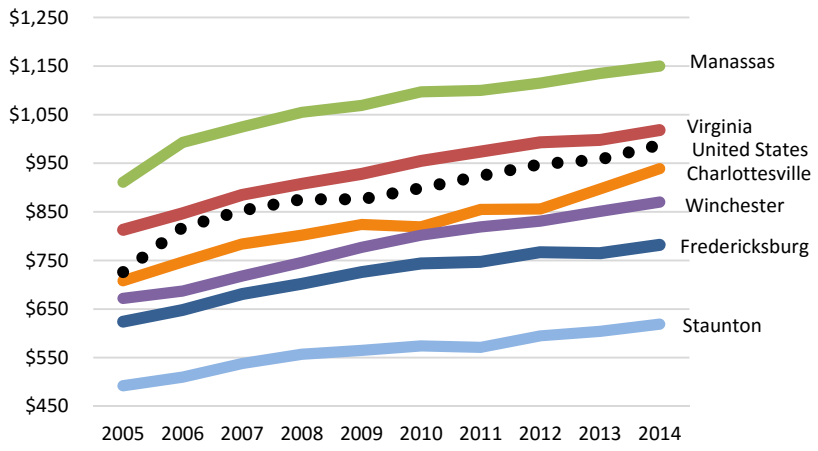
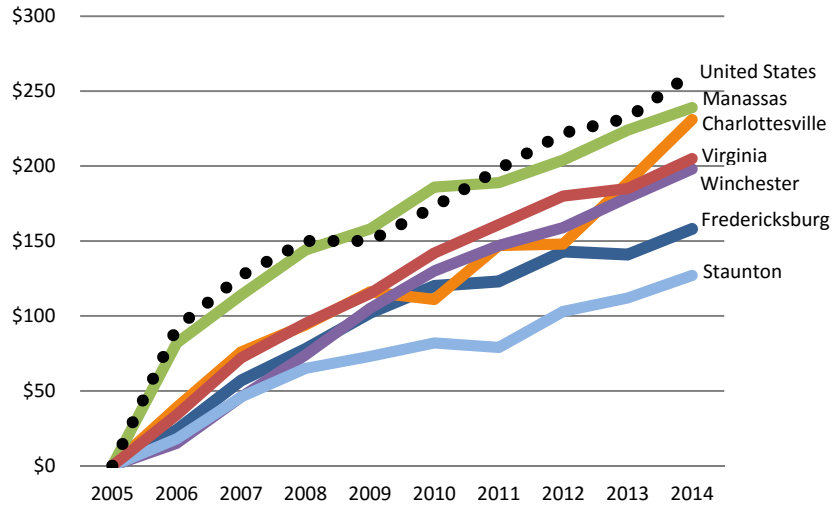
Per Capita Income 51
Self-Employment 52
Business Startups 54
Labor Force Participation 55
Household Income 59
Major Industry Sector Composition 61
Cost of Living 63

Figure 19
Ten-Year Estimated Average Weekly Wage



Source: Bureau of Labor Statistics, Garner Economics

Figure 20
2005-2014 Change in Estimated Average Weekly Wage



Source: Bureau of Labor Statistics, Garner Economics

Per Capita Income

Per capita income is the mean annual income[xlv] computed for every man, woman, and child, derived by dividing the aggregate income by the total population. Unlike the previously examined estimated weekly wage, per capita income is a measure for all residents of Fredericksburg, regardless of where they work.

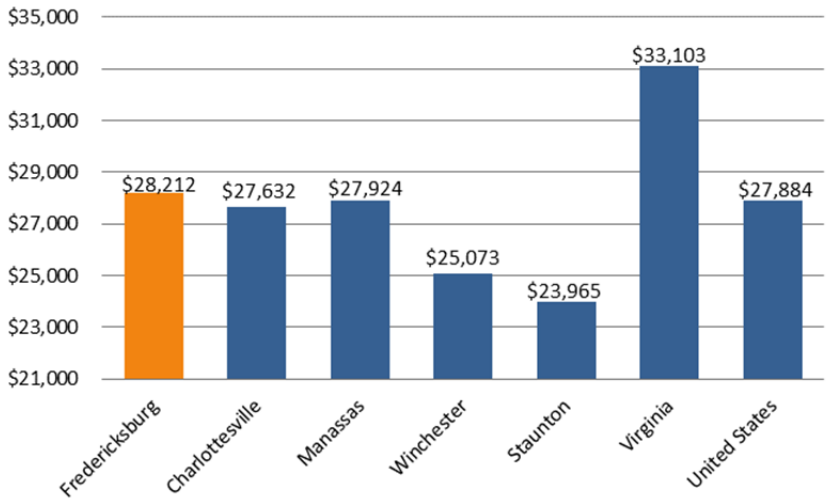
For 2013, the per capita income in Fredericksburg was $28,212, which was higher than the peer communities and the nation but below the state average of $33,103 (Figure 23 and Table 17).

Table 17
2013 Three-Year Estimates
Per Capita Income
Highest Figure Shaded

	Per Capita Income
Fredericksburg	$28,212
Charlottesville	$27,632
Manassas	$27,924
Winchester	$25,073
Staunton	$23,965
Virginia	$33,103
United States	$27,884

Source: US Census Bureau, Garner Economics

Figure 21
2011-2013 Three-Year Estimates
Per Capita Income



Source: US Census Bureau, Garner Economics

Self-Employment

Measuring the relative proportion of persons who are self-employed is a rough means to gauge entrepreneurial activity, which, in turn, can provide a view of local risk-taking and economic dynamism.

In 2013, 6.6 percent of workers in Fredericksburg were self-employed. The proportion is lower than three of the benchmark communities, the state, and the nation (Figure 24 and Table 18). Manassas had the lowest percentage at 6.2 percent.

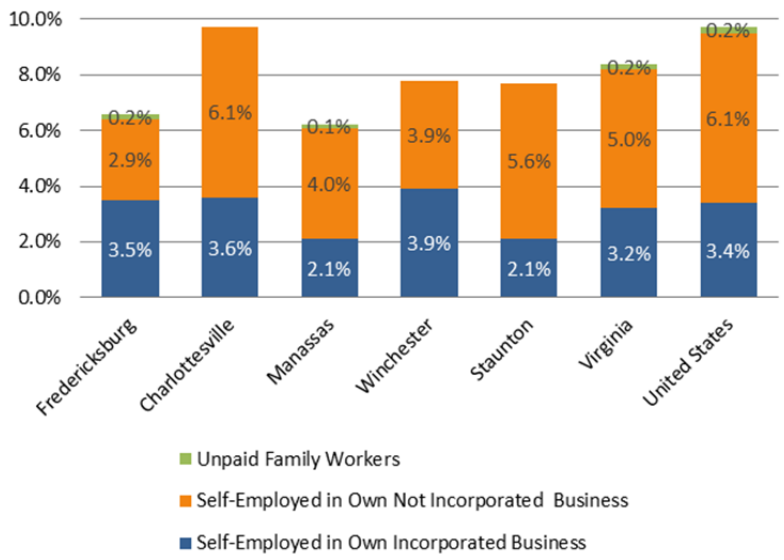
Median earnings among those Fredericksburg workers classified as *Self-Employed in Own Not Incorporated Business* were the highest among the peer communities, state, and nation (Figure 25 and Table 19) at $23,720.

Table 18
2013 Three-Year Estimates
Self-Employed as a Percentage of Workers 16 Years+
Highest Relative Number Shaded

	Self-Employed in Own Incorporated Business	Self-Employed in Own Not Incorporated Business	Unpaid Family Workers	Total
Fredericksburg	3.5%	2.9%	0.2%	6.6%
Charlottesville	3.6%	6.1%	0.0%	9.7%
Manassas	2.1%	4.0%	0.1%	6.2%
Winchester	3.9%	3.9%	0.0%	7.8%
Staunton	2.1%	5.6%	0.0%	7.7%
Virginia	3.2%	5.0%	0.2%	8.1%
United States	3.4%	6.1%	0.2%	9.5%

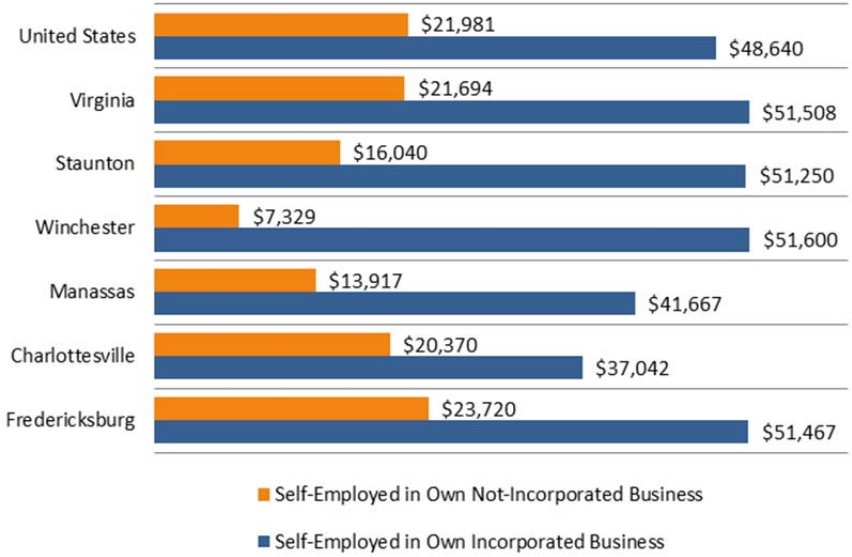
Source: US Census Bureau, Garner Economics

Figure 22
2013 Three-Year Estimates
Self-Employed as a Percentage of Workers 16 Years+



Source: US Census Bureau, Garner Economics

Figure 23
2013 Three-Year Estimates
Median Earnings
Self-Employed Workers 16 Years+



Source: US Census Bureau, Garner Economics

Table 19
2013 Three-Year Estimates
Median Earnings
Self-Employed Workers 16 Years+
Highest Relative Number Shaded

	Self-Employed in Own Incorporated Business	Self-Employed in Own Not Incorporated Business
Fredericksburg	$51,467	$23,720
Charlottesville	$37,042	$20,370
Manassas	$41,667	$13,917
Winchester	$51,600	$7,329
Staunton	$51,250	$16,040
Virginia	$51,508	$21,694
United States	$48,640	$21,981

Source: US Census Bureau, Garner Economics

[xliii] The active residential workforce is persons who are shown as employed via examination of employee and employer records per the Longitudinal Employer-Household Dynamics (LEHD) program at the US Census Bureau. For each person, a single primary job is assigned, representing the highest paying position over the time period, preventing over-counting of those workers who hold multiple positions.

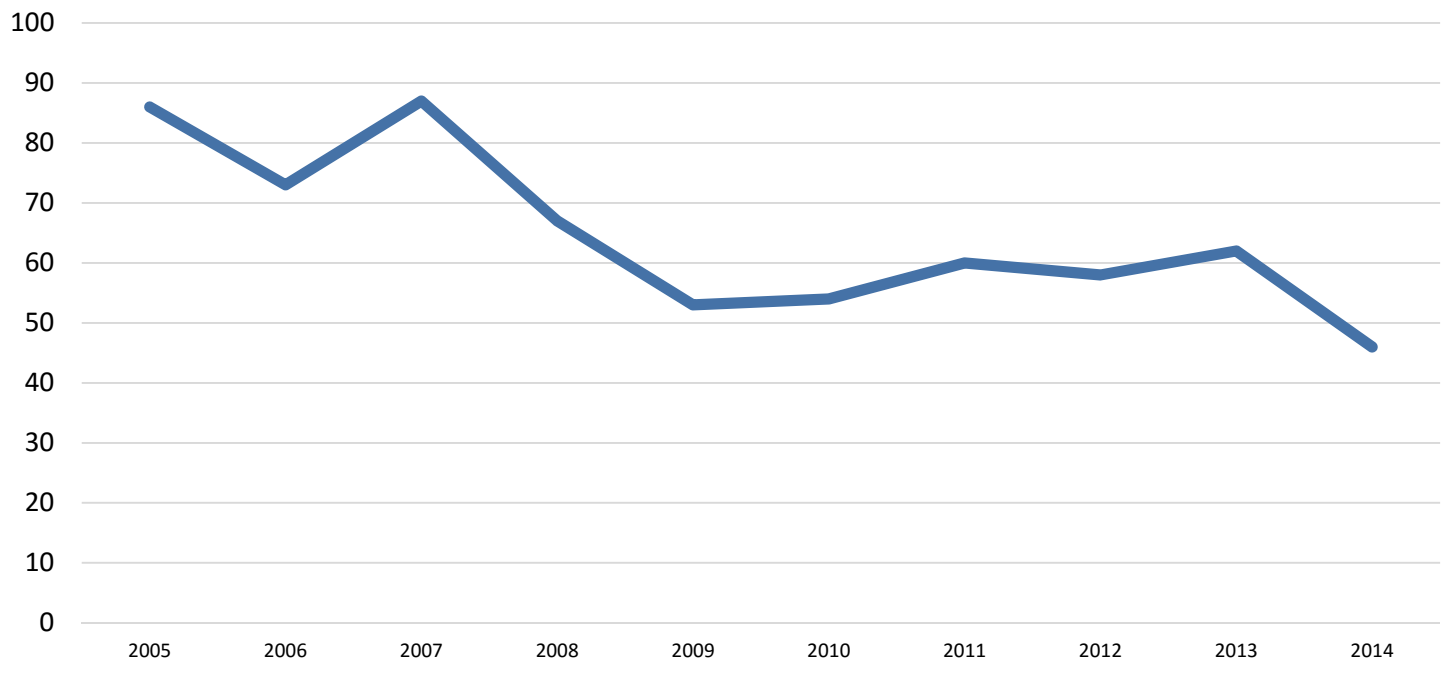
[xliv] Based on total wage and salary disbursements divided by the number of wage and salary jobs (total wage and salary employment) as reported by the Bureau of Labor Statistics.

[xlv] Income is the sum of the amounts reported separately for wage or salary income; net self-employment income; interest, dividends, net rental, or royalty income or income from estates and trusts; Social Security or Railroad Retirement income; Supplemental Security Income (SSI); public assistance or welfare payments; retirement, survivor, or disability pensions; and all other income.

Business Startups

The number of new startup firms is another measure of entrepreneurial activity and can be instrumental in new job growth creation. Fredericksburg's current total of new startup firms is half the number of the peak in 2005.

Figure 24
New Startup Firms



Source: Virginia Employment Commission, Garner Economics

Labor Force Participation

Among residents ages 16 and over in Fredericksburg, 60.7 percent are employed, which is higher than three of the benchmark communities (Charlottesville, Winchester, and Staunton), the state, and the nation. Fredericksburg's unemployment rate is above the state average but lower than the nation. Among peer communities, Fredericksburg has the second highest unemployment rate. (Table 20 and Figure 27).

Fredericksburg's proportion of families[xlvi] with two income earners (*Married, Husband and Wife in Labor Force)* is 35.3 percent, which is the lowest proportion compared to the four benchmark communities, the state, and nation (Table 21 and Figure 28). Fredericksburg did have the highest proportion of unmarried females in the labor force at 24.9 percent (*Unmarried Female in Labor Force, No Husband Present*).

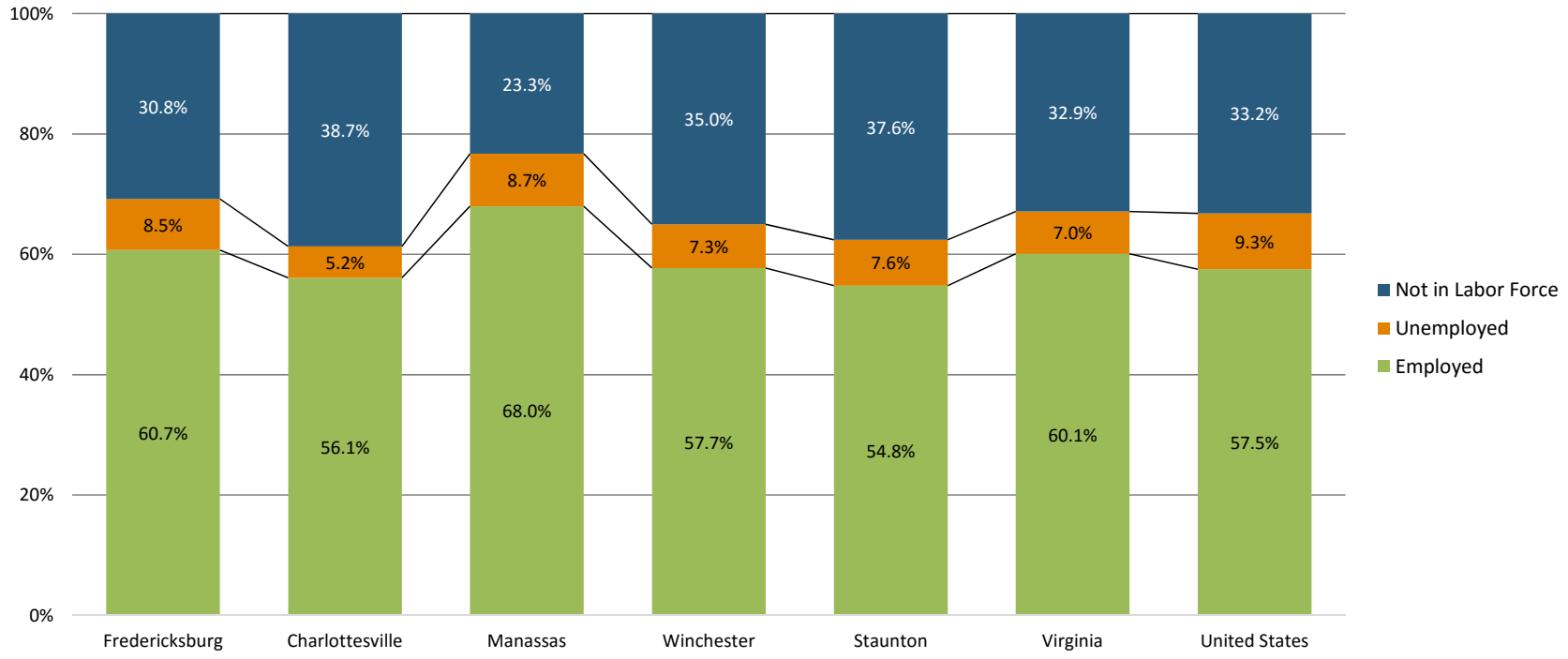
Table 20
2013 Three-Year Estimates
Employment Status
Highest Relative Rates Shaded

	Fredericksburg	Charlottesville	Manassas	Winchester	Staunton	Virginia	United States
Employed	60.7%	56.1%	68.0%	57.7%	54.8%	60.1%	57.5%
Unemployed	8.5%	5.2%	8.7%	7.3%	7.6%	7.0%	9.3%
Not in Labor Force	30.8%	38.7%	23.3%	35.0%	37.6%	32.9%	33.2%

Source: US Census Bureau, Garner Economics

[xlvi] A family consists of a householder (the person or one of the people in whose name the home is owned or rented) and one or more other people living in the same household who are related to the householder by birth, marriage, or adoption.

Figure 25
2013 Three-Year Estimates
Employment Status
Population 16+



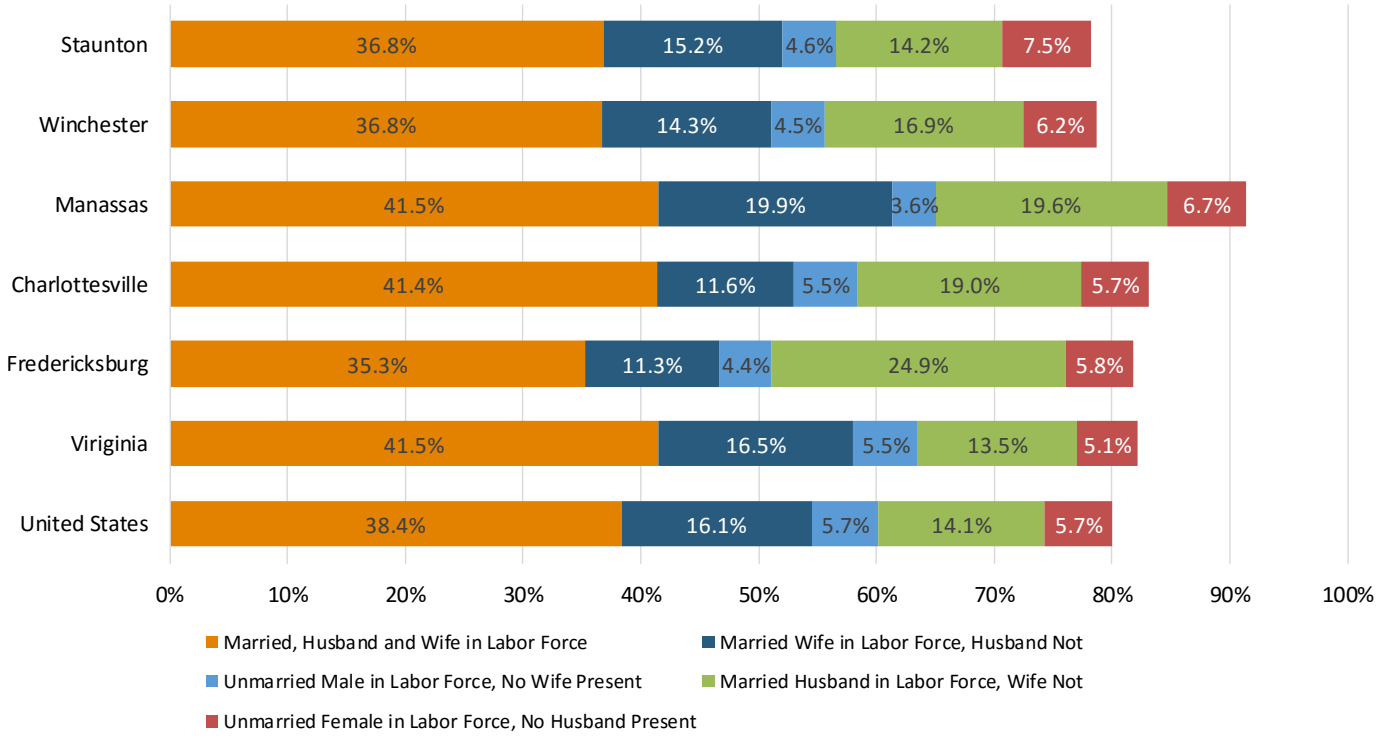
Source: US Census Bureau, Garner Economics

Table 21
2013 Three-Year Estimates
Employment Status
Percentage of All Families
Highest Relative Rates Shaded

	Fredericksburg	Charlottesville	Manassas	Winchester	Staunton	Virginia	United States
Married, Husband and Wife in Labor Force	35.3%	41.4%	41.5%	36.8%	36.8%	41.5%	38.4%
Married, Husband in Labor Force, Wife Not	11.3%	11.6%	19.9%	14.3%	15.2%	16.5%	16.1%
Married, Wife in Labor Force, Husband Not	4.4%	5.5%	3.6%	4.5%	4.6%	5.5%	5.7%
Other Families							
Unmarried Female in Labor Force, No Husband Present	24.9%	19.0%	19.6%	16.9%	14.2%	13.5%	14.1%
Unmarried Male in Labor Force, No Wife Present	5.8%	5.7%	6.7%	6.2%	7.5%	5.1%	5.7%
Total Families in Labor Force	**81.8%**	**83.1%**	**91.4%**	**78.7%**	**78.2%**	**82.1%**	**80.0%**

Source: US Census Bureau, Garner Economics

Figure 26
2013 Three-Year Estimates
Employment Status
Percentage of All Families

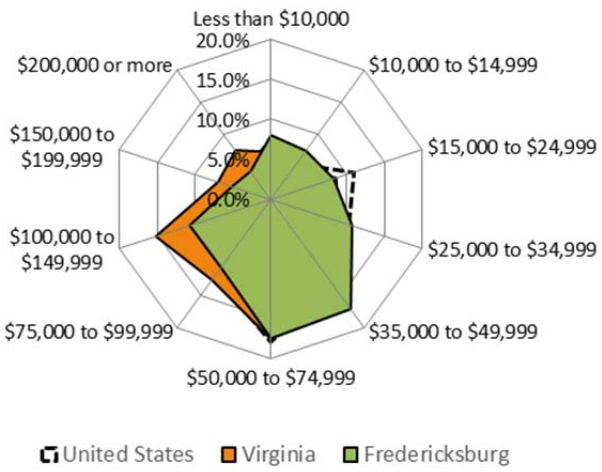


Source: US Bureau of Labor Statistics, Garner Economics

Household Income

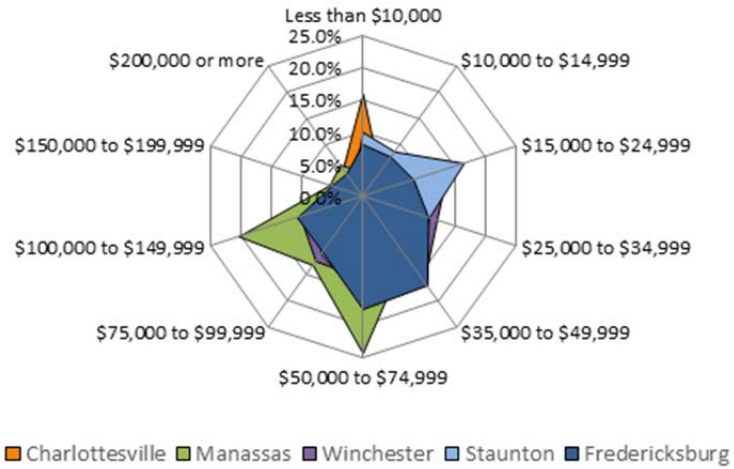
Compared to the nation and the state, Fredericksburg has the total highest share of households with incomes in the $35,000 to $49,999 category (Figure 29 and Table 22). Among the benchmark communities, Manassas has the highest share of households with incomes above $75,000 (45.0 percent) while Staunton has the lowest (23.2 percent). Fredericksburg's proportion of those above $75,000 is 30.9 percent, which is below the state average of 42.4 percent and the national average of 34.1 percent.

Figure 27
2013 Three-Year Estimates
Household Income by Percentage of Total



Source: US Census Bureau, Garner Economics

Figure 28
2013 Three-Year Estimates
Household Income by Percentage of Total



Source: US Census Bureau, Garner Economics

Table 22
2013 Three-Year Estimates
Household Income
By Percentage of Total
Highest Relative Rates Shaded

	Fredericksburg	Charlottesville	Manassas	Winchester	Staunton	Virginia	United States
Less than $10,000	8.0%	15.9%	3.8%	8.4%	9.9%	5.9%	7.5%
$10,000 to $14,999	7.5%	4.5%	1.8%	7.4%	8.5%	4.2%	5.5%
$15,000 to $24,999	8.3%	10.2%	6.6%	14.0%	16.5%	8.6%	10.9%
$25,000 to $34,999	10.7%	10.7%	7.2%	12.1%	10.8%	8.8%	10.3%
$35,000 to $49,999	17.1%	13.1%	11.3%	16.2%	14.7%	12.4%	13.6%
$50,000 to $74,999	17.5%	15.7%	24.4%	12.8%	16.2%	17.7%	17.9%
$75,000 to $99,999	10.7%	9.1%	13.2%	12.5%	11.1%	12.6%	11.9%
$100,000 to $149,999	10.7%	12.2%	20.3%	10.2%	6.7%	15.2%	12.7%
$150,000 to $199,999	5.1%	3.4%	5.4%	2.3%	3.0%	7.0%	4.8%
$200,000 or more	4.3%	5.2%	6.0%	4.0%	2.5%	7.6%	4.8%

Source: US Census Bureau, Garner Economics

Major Industry Sector Composition

A comparison of major industry employment provides a broad relative assessment of differences among economies and may help indicate areas of uniqueness. Fredericksburg has the highest relative percentages in two industries, *Real Estate and Rental and Leasing* and *Accommodation and Food Services,* out of 20 major industry categories. Conversely, Fredericksburg had the lowest percentage of employment in six industry categories: *Manufacturing*; *Transportation and Warehousing*; *Professional, Scientific, and Technical Services*; *Administrative and Support and Waste Management*; *Educational Services*; and *Other Services (except Public Administration)*. Overall, the largest industry sectors for employment in Fredericksburg are: *Health Care and Social Assistance* (25 percent), *Government* (16.9 percent), *Accommodation and Food Services* (16.3 percent), and *Retail Trade* (14.5 percent).

A detailed analysis of Fredericksburg's industrial and occupational specialization relative to the nation can be found in Chapter 7: Local Specialization, Competitiveness & Growth (Pages 77 & 81) as well as the Appendices.

Table 23
Major Industry Sector Composition-2015, Percentage of Total Employment
Highest Relative Percentages Shaded
Lowest Relative Percentages Shaded

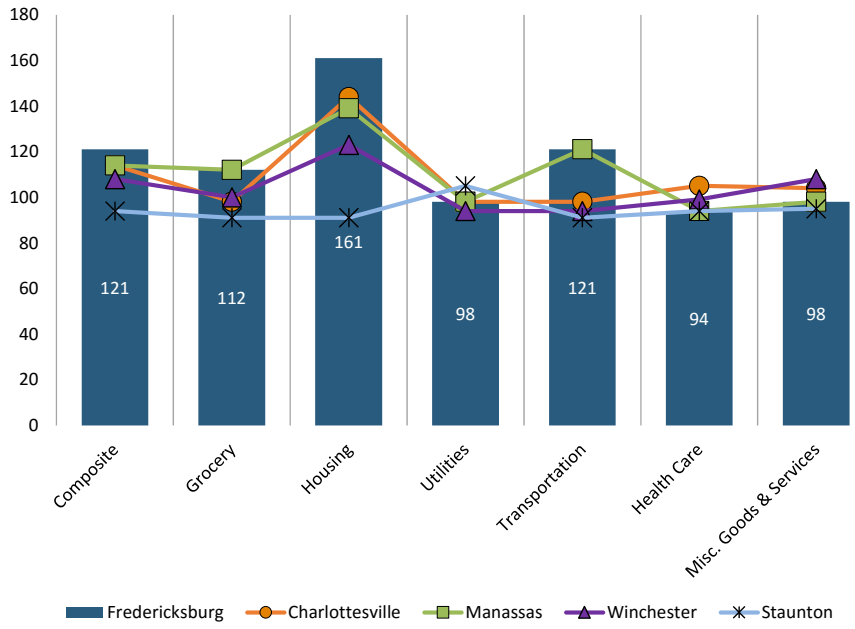
Industry Sector	Fredericksburg	Charlottesville	Manassas	Winchester	Staunton	Virginia	United States
Crop and Animal Production	0%	0%	0%	0.2%	0%	0.6%	1.2%
Mining, Quarrying, and Oil and Gas Extraction	0%	0%	0.1%	0%	0%	0.2%	0.6%
Utilities	0.1%	0.2%	0.0%	0.0%	0.6%	0.3%	0.4%
Construction	2.3%	3.8%	8.2%	1.9%	2.8%	5.6%	5.4%
Manufacturing	1.0%	1.8%	8.6%	6.9%	3.3%	5.7%	8.0%
Wholesale Trade	1.5%	1.3%	1.6%	1.7%	2.1%	2.7%	3.9%
Retail Trade	14.5%	8.0%	8.8%	16.2%	15.7%	10.2%	10.4%
Transportation and Warehousing	0.5%	0.9%	1.5%	1.3%	1.9%	3.0%	3.3%
Information	2.0%	3.1%	0.4%	0.8%	0.8%	1.7%	1.9%
Finance and Insurance	2.9%	3.2%	1.5%	2.4%	2.7%	3.3%	4.0%
Real Estate and Rental and Leasing	1.9%	1.8%	1.2%	1.9%	1.7%	1.5%	1.7%
Professional, Scientific, and Technical Services	3.8%	5.4%	14.0%	4.8%	4.0%	10.0%	6.3%
Management of Companies and Enterprises	2.5%	1.0%	0.5%	1.8%	2.9%	1.8%	1.4%
Administrative and Support and Waste Management	2.3%	4.2%	7.2%	4.1%	2.3%	5.8%	6.3%
Educational Services	1.4%	2.2%	3.3%	4.6%	5.2%	2.0%	2.5%
Health Care and Social Assistance	25.0%	6.8%	14.8%	25.6%	12.5%	10.4%	12.4%
Arts, Entertainment, and Recreation	1.2%	2.3%	0.8%	0.8%	1.2%	1.4%	1.7%
Accommodation and Food Services	16.3%	11.7%	7.7%	10.2%	9.4%	7.9%	8.4%
Other Services (except Public Administration)	3.9%	6.2%	4.9%	4.1%	7.7%	5.2%	4.8%
Government	16.9%	36.1%	15.1%	10.9%	23.3%	20.7%	15.5%

Source: EMSI Q2 2015 Data Set; Garner Economics

Cost of Living

The 2014 composite cost-of-living index for Fredericksburg is estimated to be 121 (the national average is set at 100). Compared to the benchmark communities, Fredericksburg has the overall highest cost of living and highest housing costs (Figure 31 and Table 24). Fredericksburg ties Manassas with the highest costs in the categories of grocery and transportation. Fredericksburg is lower than the national average in the categories of utilities, health care, and miscellaneous goods and services.

Figure 29
Fredericksburg Cost-of-Living Index 2014



Source: Areavibes.com, Garner Economics

Table 24
Metro-Level Cost-of-Living Index 2014

	Composite	Grocery	Housing	Utilities	Transportation	Health Care	Misc. Goods & Services
Fredericksburg	121	112	161	98	121	94	98
Charlottesville	114	98	144	98	98	105	104
Manassas	114	112	139	98	121	94	98
Winchester	108	100	123	94	94	99	108
Staunton	94	91	91	105	91	94	95

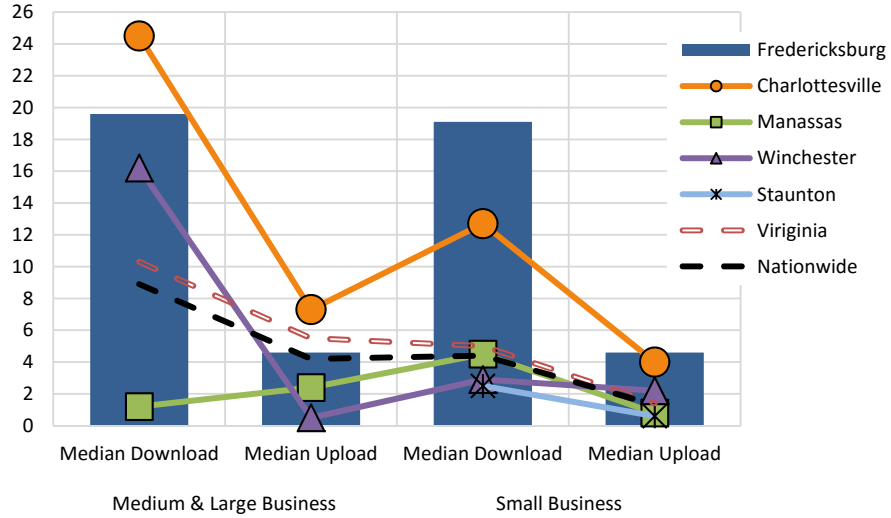
Source: Areavibes.com, Garner Economics

Broadband

According to the National Telecommunications and Information Administration, households in Fredericksburg have the lowest availability (access) to DSL compared to the four peer communities, state, and nation. Fredericksburg's cable availability of 86.1 percent is above the state average of 79.5 percent and just slightly below the national availability of 88.8 percent. Charlottesville has the highest availability to cable at 97.5 percent.

Fredericksburg's medium & large businesses experience higher median download speeds than Manassas, Winchester, the state, and nation (Figure 32 and Table 25). Small businesses in Fredericksburg have the highest median download and upload speeds compared to the four peer communities, state, and nation.

Figure 30
2014 Broadband Speeds (Mbps)



Source: National Telecommunications and Information Administration; Garner Economics

Table 25
2014 Broadband Availability & Speed
Highest Relative Figure Shaded

	Fredericksburg	Charlottesville	Manassas	Winchester	Staunton	Virginia	Nationwide
Availability							
DSL	81.2%	98.9%	100.0%	95.4%	98.0%	83.9%	90.0%
Cable	86.1%	97.5%	77.0%	90.4%	70.6%	79.5%	88.8%
Two or More Wireline Providers	86.4%	97.6%	98.7%	91.8%	92.0%	83.8%	88.4%
Speed (megabytes per second or Mbps)							
Medium & Large Businesses (parentheses indicates cumulative tests for both download & upload)							
Median Download	19.6 (3)	24.5 (10)	1.2 (1)	16.2 (1)	** (0)	10.3 (1,108)	8.9
Median Upload	4.6	7.3	2.4	0.5	**	5.5	4.2
Small Business							
Median Download	19.1 (10)	12.7 (37)	4.5 (6)	2.9 (6)	2.5 (3)	5 (1,225)	4.4
Median Upload	4.6	4.0	0.8	2.2	0.6	1.4	1.3

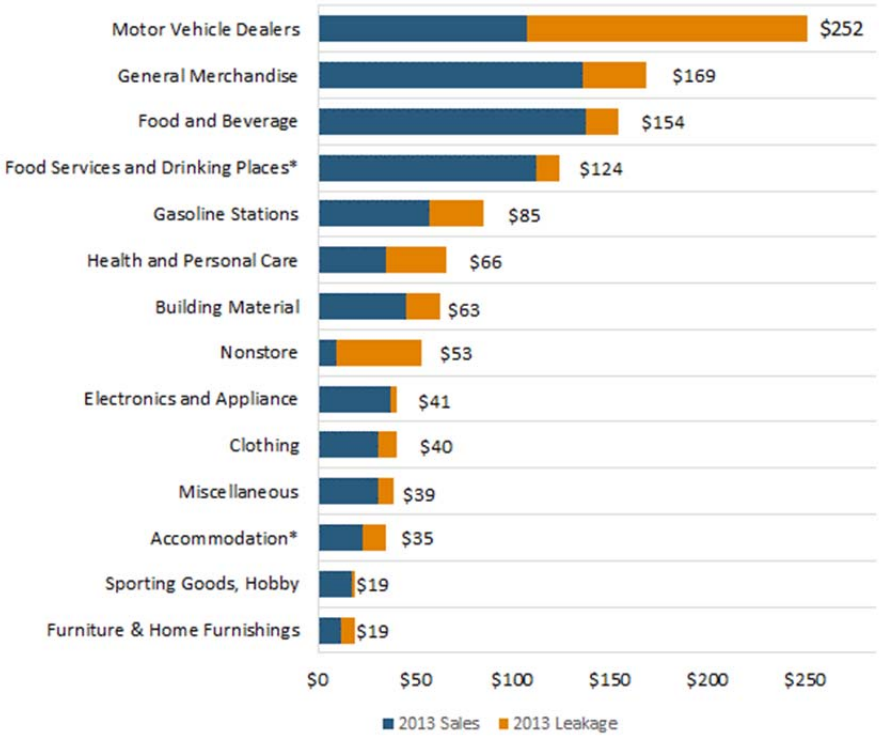
Source: National Telecommunications and Information Administration; Garner Economics
***Data not available*

Chapter 6: Retail Leakage Analysis

To determine specific industries with retail potential, a retail leakage analysis was conducted. Retail leakage represents the dollar amount that shoppers from Fredericksburg spent outside of the region. In other words, it is the dollars that "leaked" out of the economy. If leakage is a high proportion of Fredericksburg residents' total dollars spent in a particular trade area, the community could potentially support more businesses in that area.

Overall, Fredericksburg's average percentage of leakage is 31 percent, indicating that shoppers from Fredericksburg spend nearly 70 percent of all dollars in the region. A review of each 14 major retail categories in Fredericksburg shows three industries with 50 percent or higher leakage. The largest percentage leakage is in the category Nonstore Retailers, which leaked 81.8 percent of sales or $43.7 million out of $53.4 million sales (Table 26 and Figure 33). The other two industries with the largest percentage of leakage are Motor Vehicle and Parts Dealers with 57.3 percent leakage and Health and Personal Care Stores with 47.4 percent leakage.

Figure 31
Fredericksburg Residents
2013 Sales in the Region and Leakage (in Millions)



* Industries belonging to NAICS 72: Accommodation and Food Services have been included as a convenience. Technically, these are not retail industries.

Table 26

2013 Fredericksburg Retail Demand and Leakage (Main 3 Digit NAICS Shaded)

NAICS Code	Retail Category	Consumer Demand	2013 Leaked Outside Fredericksburg	% Leaked
441	**Motor Vehicle & Parts Dealers**	**$251,905,080**	**$144,313,235**	**57.3%**
4411	Automobile Dealers	$217,035,202	$130,385,723	60.1%
4412	Other Motor Vehicle Dealers	$12,332,713	$11,073,826	89.8%
4413	Auto Parts, Accessories & Tire Stores	$22,537,165	$2,853,686	12.7%
442	**Furniture & Home Furnishings Stores**	**$18,828,321**	**$6,610,376**	**35.1%**
4421	Furniture Stores	$10,442,378	$764,965	7.3%
4422	Home Furnishings Stores	$8,385,943	$5,845,411	69.7%
443	**Electronics and Appliance Stores**	**$40,781,522**	**$3,728,227**	**9.1%**
444	**Bldg. Materials, Garden Equip. & Supply Stores**	**$62,731,402**	**$17,624,621**	**28.1%**
4441	Bldg. Material & Supplies Dealers	$53,905,696	$12,840,795	23.8%
4442	Lawn & Garden Equip & Supply Stores	$8,825,706	$4,783,826	54.2%
445	**Food & Beverage Stores**	**$154,407,702**	**$16,873,168**	**10.9%**
4451	Grocery Stores	$136,019,906	$11,732,908	8.6%
4452	Specialty Food Stores	$10,294,979	$5,106,780	49.6%
4453	Beer, Wine, and Liquor Stores	$8,092,817	$33,481	0.4%
446	**Health & Personal Care Stores**	**$66,221,297**	**$31,374,315**	**47.4%**
447	**Gasoline Stations**	**$85,431,175**	**$27,919,482**	**32.7%**
448	**Clothing & Clothing Accessories Stores**	**$40,237,206**	**$9,345,491**	**23.2%**
4481	Clothing Stores	$28,263,910	$5,304,909	18.8%
4482	Shoe Stores	$4,933,781	$1,797,530	36.4%
4483	Jewelry, Luggage & Leather Goods Stores	$7,039,515	$2,243,052	31.9%
451	**Sporting Goods, Hobby, Book & Music Stores**	**$19,065,218**	**$1,775,557**	**9.3%**
4511	Sporting Goods/Hobby/Musical Instr. Stores	$15,942,455	$1,212,699	7.6%
4512	Book, Periodical & Music Stores	$3,122,763	$562,858	18.0%
452	**General Merchandise Stores**	**$169,075,749**	**$33,137,814**	**19.6%**
4521	Department Stores Excluding Leased Depts.	$54,362,276	$25,442,140	46.8%
4529	Warehouse Clubs and Supercenters	$114,713,473	$7,695,673	6.7%
453	**Miscellaneous Store Retailers**	**$39,196,664**	**$8,067,960**	**20.6%**
4531	Florists	$2,812,462	$147,676	5.3%
4532	Office Supplies, Stationery & Gift Stores	$11,707,432	$845,604	7.2%
4533	Used Merchandise Stores	$6,773,876	$30,852	0.5%
4539	Other Miscellaneous Store Retailers	$17,902,895	$7,043,827	39.3%

NAICS Code	Retail Category	Consumer Demand	2013 Leaked Outside Fredericksburg	% Leaked
454	**Nonstore Retailers**	**$53,377,896**	**$43,673,793**	**81.8%**
4541	Electronic Shopping & Mail-Order Houses	$29,731,927	$25,908,307	87.1%
4542	Vending Machine Operators	$2,320,734	$27,230	1.2%
4543	Direct Selling Establishments	$21,325,234	$17,738,255	83.2%
721	**Accommodation***	**$34,906,051**	**$11,708,086**	**33.5%**
7211	Traveler Accommodation*	$32,767,007	$10,331,300	31.5%
7212	RV (Recreational Vehicle) Parks and Recreational Camps*	$1,368,811	$1,368,811	100.0%
7213	Rooming and Boarding Houses*	$770,234	$7,975	1.0%
722	**Food Services and Drinking Places***	**$124,432,240**	**$12,438,636**	**10.0%**
7223	Special Food Services*	$7,413,989	$1,458,759	19.7%
7224	Drinking Places (Alcoholic Beverages)*	$2,704,780	$2,704,780	100.0%
7225	Restaurants and Other Eating Places*	$114,313,471	$8,275,096	7.2%
	Total	$1,160,597,522	$368,590,761	31.8%

* Industries belonging to NAICS 72: Accommodation and Food Services have been included as a convenience. Technically, these are not retail industries.

Source: EMSI, Garner Economics

Chapter 7: Local Specialization, Competitiveness & Growth

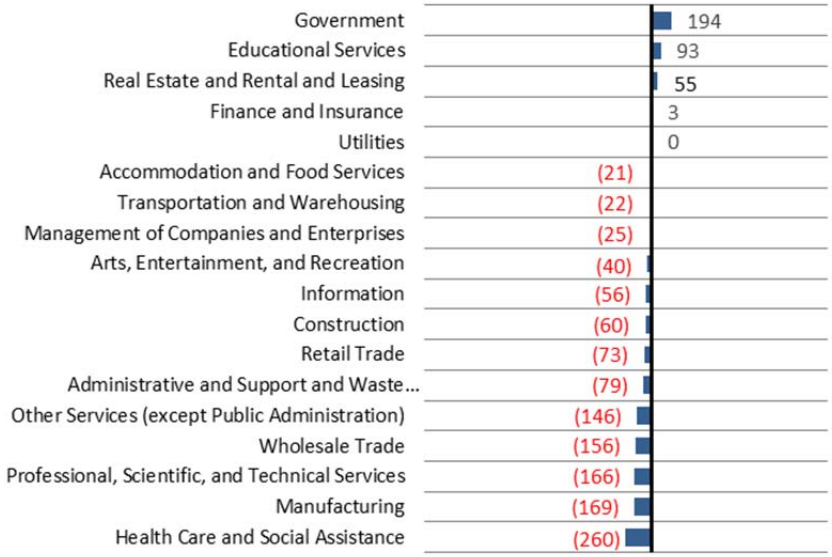
The following section provides a more detailed and in-depth assessment of the Fredericksburg area economy. The analysis examines the local economy from several different perspectives, each adding a supporting layer of information. The assessment's main goals are to provide historic context, reveal areas of unique specialization, gauge competitiveness, and help uncover emerging trends and opportunities.

The two main areas of analysis are: **major industries** and **occupational groups**. For each area, there are relative measures of specialization, growth, local competitiveness, and earnings.

Major Industry Sector Change

Over the last five years, the largest absolute industry jobs gains in Fredericksburg came from *Government*, up 194 jobs or 5 percent, and *Educational Services*, up 93 jobs or 36 percent (Figure 34 and Table 27). There were significant job losses in five sectors: *Health Care and Social Assistance* (-260 jobs/4 percent); *Manufacturing* (-169 jobs/39 percent); *Professional, Scientific, and Technical Services* (-166 jobs/15 percent); *Wholesale Trade* (-156 jobs/29 percent); and *Other Services* (-146 jobs/13 percent).

Figure 32
Fredericksburg Employment Change by Major Industry
2011-2015



Source: EMSI Q2 2015 Data Set; Garner Economics

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Table 27
Fredericksburg
Employment Change by Major Industry
2011-2015
Ranked by Absolute Change

Major Industry Sector	2015 Jobs	Employment Change	
		#	%
Government	4,334	194	5%
Educational Services	349	93	36%
Real Estate and Rental and Leasing	494	55	13%
Finance and Insurance	734	3	0%
Utilities	30	0	0%
Accommodation and Food Services	4,198	(21)	0%
Transportation and Warehousing	128	(22)	-15%
Management of Companies and Enterprises	652	(25)	-4%
Arts, Entertainment, and Recreation	313	(40)	-11%
Information	519	(56)	-10%
Construction	601	(60)	-9%
Retail Trade	3,727	(73)	-2%
Administrative and Support and Waste Management and Remediation Services	582	(79)	-12%
Other Services (except Public Administration)	997	(146)	-13%
Wholesale Trade	391	(156)	-29%
Professional, Scientific, and Technical Services	976	(166)	-15%
Manufacturing	260	(169)	-39%
Health Care and Social Assistance	6,412	(260)	-4%

Source: EMSI Q2 2015 Data Set, Garner Economics

Industry Earnings

A comparison of Fredericksburg's average industry earnings to national averages may offer insights into areas of unique expertise or cost-saving opportunities. Industrial average earnings in Fredericksburg are below the national same-industry average in all major sectors except for *Health Care and Social Assistance* (18.1 percent higher) and *Construction* (3.9 percent higher).

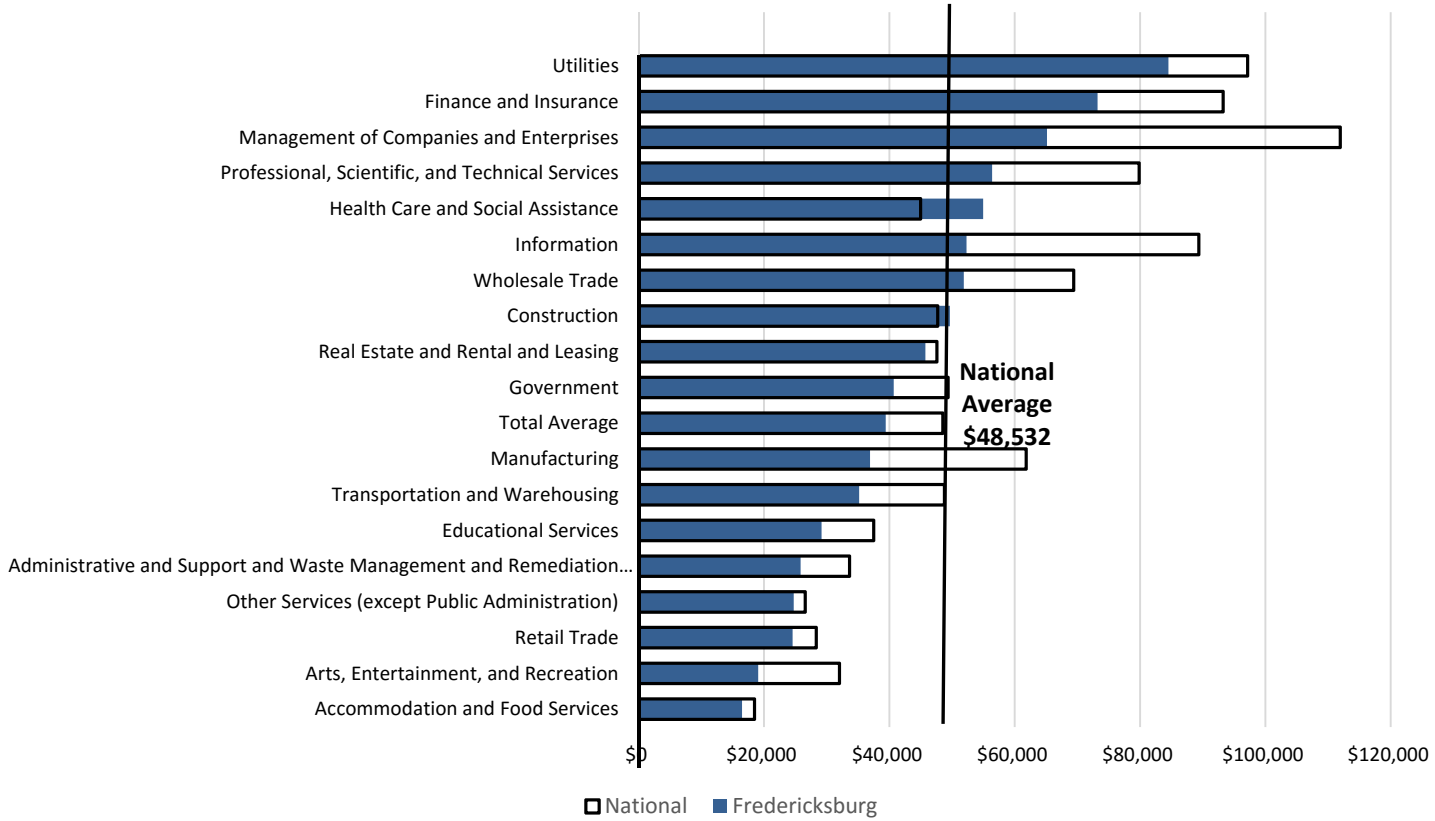
Table 28

Average Annual Industry Earnings Comparison, 2015

	Fredericksburg	National	Percent Difference
Utilities	$84,520	$97,177	-15.0%
Finance and Insurance	$73,222	$93,258	-27.4%
Management of Companies and Enterprises	$65,159	$111,951	-71.8%
Professional, Scientific, and Technical Services	$56,394	$79,855	-41.6%
Health Care and Social Assistance	$54,963	$44,991	18.1%
Information	$52,302	$89,374	-70.9%
Wholesale Trade	$51,867	$69,416	-33.8%
Construction	$49,667	$47,722	3.9%
Real Estate and Rental and Leasing	$45,744	$47,591	-4.0%
Government	$40,699	$49,372	-21.3%
Total Average	**$39,428**	**$48,532**	**-23.1%**
Manufacturing	$36,921	$61,835	-67.5%
Transportation and Warehousing	$35,179	$48,777	-38.7%
Educational Services	$29,173	$37,501	-28.5%
Administrative and Support and Waste Management and Remediation Services	$25,826	$33,641	-30.3%
Other Services (except Public Administration)	$24,752	$26,584	-7.4%
Retail Trade	$24,563	$28,347	-15.4%
Arts, Entertainment, and Recreation	$19,074	$32,030	-67.9%
Accommodation and Food Services	$16,495	$18,484	-12.1%

Source: EMSI, Garner Economics

Figure 33
Average Industry Earnings Comparison, 2015

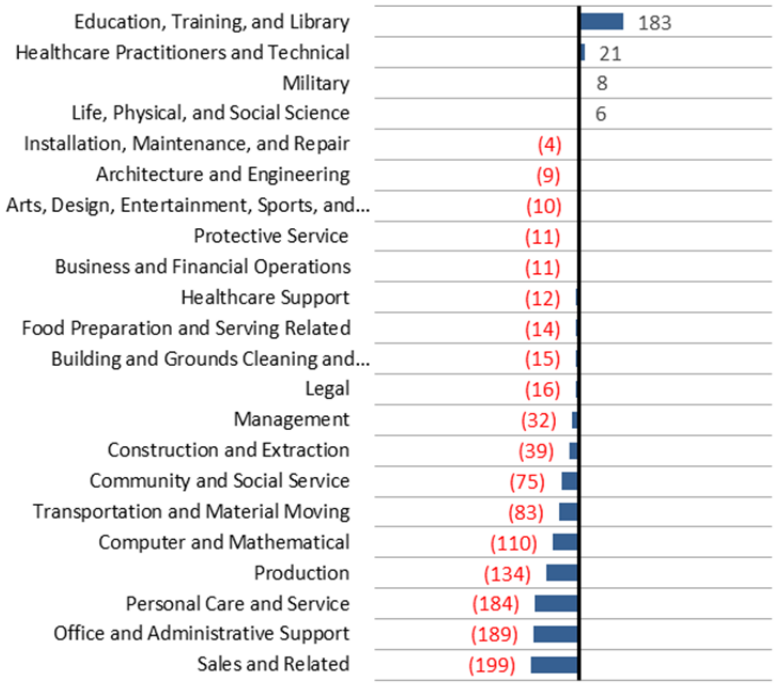


Source: EMSI, Garner Economics

Major Occupational Change

Over the last five years, the single largest absolute occupational gains in Fredericksburg came from *Education, Training, and Library Occupations,* up 183 jobs or 16 percent (Figure 36 and Table 29). The greatest job losses were in the occupational areas of *Sales and Related* (-199 jobs/6 percent), *Office and Administrative Support* (-189 jobs/5 percent), and *Personal Care and Service* (-184 jobs/16 percent).

Figure 34
Fredericksburg
Employment Change by Major Occupational Groups
2011-2015



Source: EMSI, Garner Economics

Table 29
Fredericksburg
Employment Change by Major Occupational Groups
2011-2015
Ranked by Absolute Change

Major Occupational Groups	2015 Jobs	Employment Change #	Employment Change %
Education, Training, and Library	1323	183	16%
Healthcare Practitioners and Technical	3007	21	1%
Military	412	8	2%
Life, Physical, and Social Science	157	6	4%
Installation, Maintenance, and Repair	609	(4)	-1%
Architecture and Engineering	177	(9)	-5%
Arts, Design, Entertainment, Sports, and Media	405	(10)	-2%
Business and Financial Operations	1280	(11)	-1%
Protective Service	564	(11)	-2%
Healthcare Support	974	(12)	-1%
Food Preparation and Serving Related	3802	(14)	0%
Building and Grounds Cleaning and Maintenance	657	(15)	-2%
Legal	255	(16)	-6%
Management	1189	(32)	-3%
Construction and Extraction	546	(39)	-7%
Community and Social Service	499	(75)	-13%
Transportation and Material Moving	809	(83)	-9%
Computer and Mathematical	714	(110)	-13%
Production	410	(134)	-25%
Personal Care and Service	962	(184)	-16%
Office and Administrative Support	3789	(189)	-5%
Sales and Related	3150	(199)	-6%

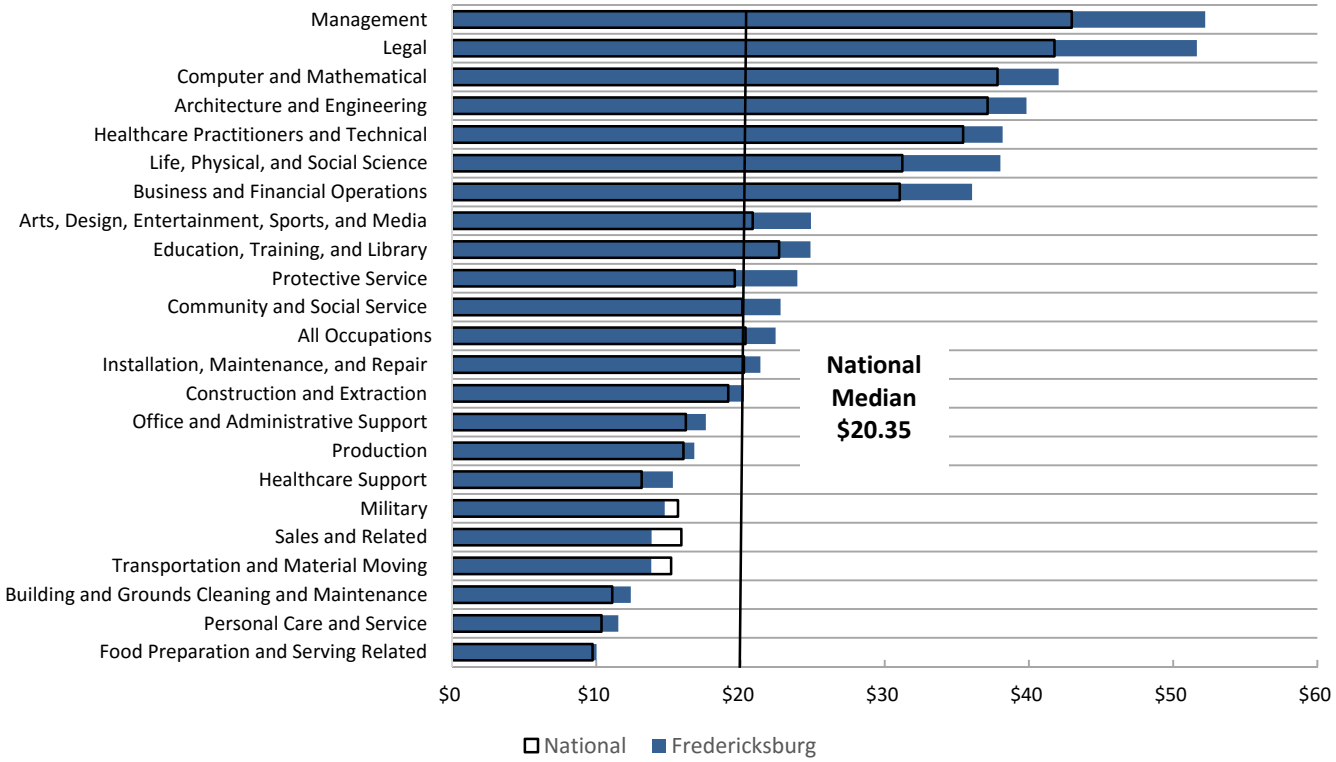
Source: EMSI, Garner Economics

Occupational Earnings

A comparison of the same-occupation median hourly earnings in Fredericksburg to the national medians may offer insights into areas of unique expertise or cost-saving opportunities. Fredericksburg's median hourly earnings were above the nation for all occupations except for *Military*, *Sales and Related*, and *Transportation and Material Moving*.

Figure 35

Fredericksburg Median Hourly Occupational Earnings Comparison, 2015



Source: Bureau of Labor Statistics, Garner Economics

Table 30
Median Hourly Occupational Earnings Comparison
2015

Major Occupational Groups	Fredericksburg	National	Percent Difference
Management	$52.22	$42.97	17.7%
Legal	$51.64	$41.77	19.1%
Computer and Mathematical	$42.06	$37.83	10.1%
Architecture and Engineering	$39.83	$37.13	6.8%
Healthcare Practitioners and Technical	$38.17	$35.44	7.2%
Life, Physical, and Social Science	$38.02	$31.22	17.9%
Business and Financial Operations	$36.05	$31.04	13.9%
Arts, Design, Entertainment, Sports, and Media	$24.88	$20.85	16.2%
Education, Training, and Library	$24.85	$22.67	8.8%
Protective Service	$23.94	$19.61	18.1%
Community and Social Service	$22.78	$20.13	11.6%
All Occupations	**$22.43**	**$20.35**	**9.3%**
Installation, Maintenance, and Repair	$21.38	$20.23	5.4%
Construction and Extraction	$20.23	$19.14	5.4%
Office and Administrative Support	$17.60	$16.21	7.9%
Production	$16.80	$16.05	4.5%
Healthcare Support	$15.31	$13.15	14.1%
Military	$14.74	$15.67	-6.3%
Sales and Related	$13.83	$15.89	-14.9%
Transportation and Material Moving	$13.81	$15.19	-10.0%
Building and Grounds Cleaning and Maintenance	$12.39	$11.11	10.3%
Personal Care and Service	$11.53	$10.36	10.1%
Food Preparation and Serving Related	$10.02	$9.74	2.8%

Source: Bureau of Labor Statistics, Garner Economics

The following assessment tools include a series of bubble/scatter charts and tables. Axis and quadrant labels should be read as only general guides resulting from purely quantitative analysis, not definitive conclusions. Each chart and table is meant as only one piece of a multiple-part analysis. To assist the reader in interpreting the bubble charts, each axis and quadrant is labeled with broad descriptives.

Chart axis definitions:

- **Specialization**: measured using location quotient (LQ).[xlvii] Reflects the level of relative concentration of a particular occupation/industry in Fredericksburg to the nation. In simple terms, a high LQ (above 1.2) indicates what a local economy is good at doing and implies there are unique skills, institutions, raw materials, etc., that support this position.
- **Industry Effect:** The portion of growth/decline attributed to a particular industry nationwide. For example, if hospital employment grew by five percent nationwide in 2011, we would expect to see the same percentage increase locally, assuming that the forces driving nationwide growth would have a similar local impact.
- **Local Effect:** The proportion of growth/decline not captured by the industry effect, indicating unique local performance. The local effect measures local activity outside the expected nationwide trend. A consistent positive local competitive effect signals superior local performance.

Chart quadrant label definitions:

- **At-Risk:** Locally specialized and recent local job losses.
- **Competitive:** Locally specialized and recent local job gains.
- **Declining:** Not locally specialized and recent local job losses.
- **Emerging:** Not locally specialized and recent local job gains.
- **Local Decline/National Growth:** Industry or occupation gains nationwide and local losses or gains below nationwide trend.
- **Local Growth/National Growth:** Industry or occupation gains nationwide and positive local gains or losses less than nationwide trend.
- **Local Growth/National Decline:** Industry or occupation losses nationwide and positive local gains or losses less than nationwide trend.
- **Local Decline/National Decline:** Industry or occupation losses nationwide and local losses or gains below nationwide trend.

Detailed occupational and industry information for Fredericksburg can be found in the Appendices.

[xlvii] To measure local specialization, location quotients (LQs) for each occupation or industry are derived. LQs are ratios of an area's distribution of employment for a specific occupation/industry compared to a reference or base area's distribution. In this analysis, the reference area is the United States. If an LQ is equal to 1, then the industry has the same share of its area employment as it does in the reference area. An LQ greater than 1 indicates an industry with a greater share of the local area employment than is the case in the reference area and implies local specialization. LQs are calculated by first dividing local industry employment by the all-industry total of local employment. Second, reference area industry employment is divided by the all-industry total for the reference area. Finally, the local ratio is divided by the reference area ratio.

Major Industry Sector Specialization & Growth

Major industry sector specialization focuses on the geographic concentrations of similarly classified industries. For many industry sectors, there exists interconnectedness among suppliers, occupations, and associated supporting institutions.

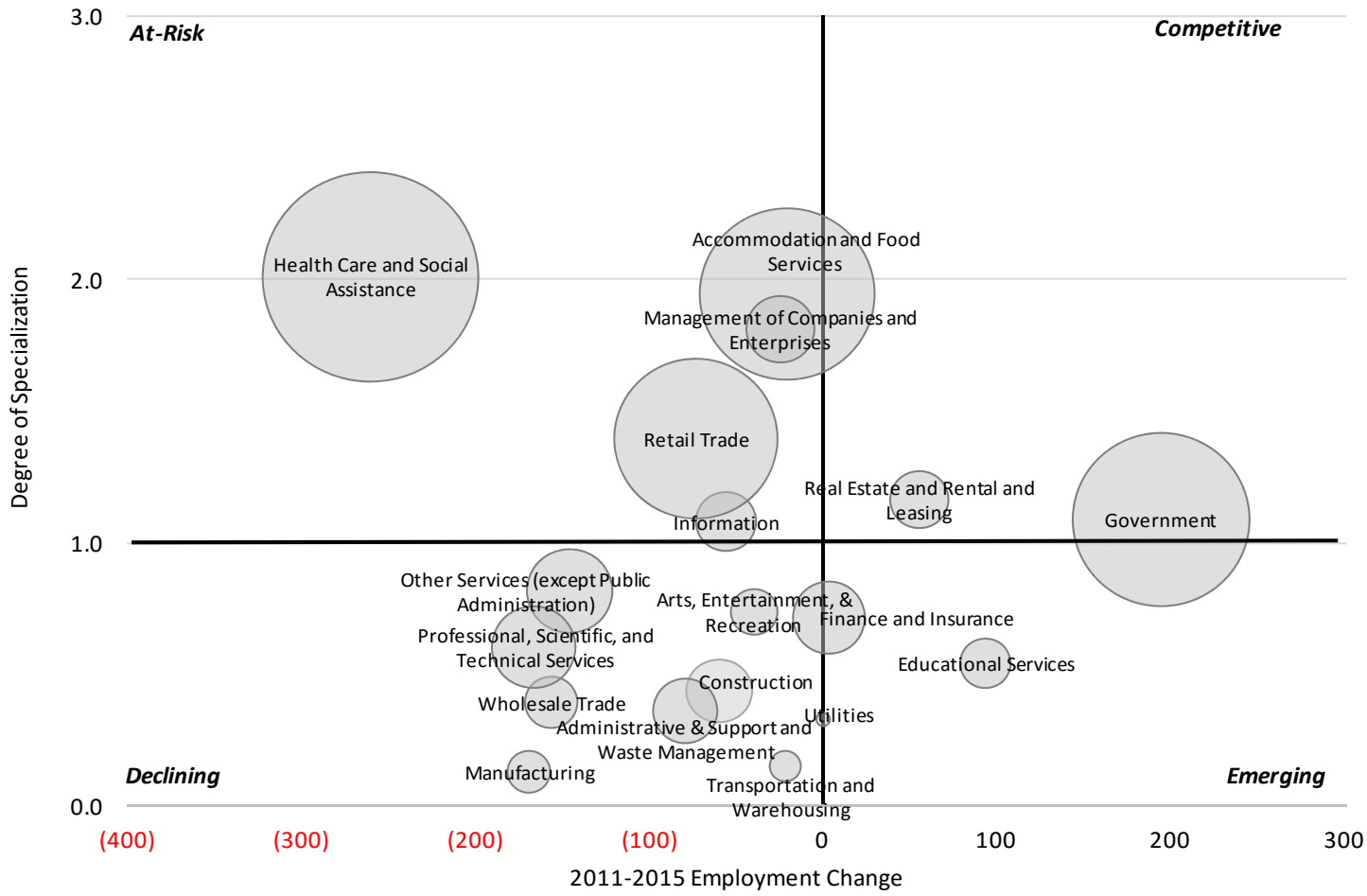
Observations: There are two industry sectors with a level of local specialization above 1.0 that grew within the last five years: *Government and Real Estate and Rental and Leasing* (Figure 38 and Table 31). The biggest industry at risk is *Health Care and Social Assistance*, which has a high local specialization at 2.01 but experienced a loss of 260 jobs over the past five years.

Table 31
Fredericksburg Industry Specialization & Growth

Industry Sector	Five-Year Job Change	Location Quotient	2015 Jobs
Competitive			
Government	194	1.09	4,334
Real Estate and Rental and Leasing	55	1.16	494
Emerging			
Educational Services	93	0.54	349
Finance and Insurance	3	0.72	734
Utilities	0	0.33	30
At-Risk			
Accommodation and Food Services	(21)	1.94	4,198
Management of Companies and Enterprises	(25)	1.81	652
Information	(56)	1.08	519
Retail Trade	(73)	1.39	3,727
Health Care and Social Assistance	(260)	2.01	6,412
Declining			
Transportation and Warehousing	(22)	0.15	128
Arts, Entertainment, and Recreation	(40)	0.74	313
Construction	(60)	0.44	601
Administrative and Support and Waste Management and Remediation Services	(79)	0.36	582
Other Services (except Public Administration)	(146)	0.81	997
Wholesale Trade	(156)	0.39	391
Professional, Scientific, and Technical Services	(166)	0.60	976
Manufacturing	(169)	0.13	260

Source: EMSI, Garner Economics

Figure 36
Fredericksburg Industry Specialization & Growth



Size of the bubble represents total employment.
Source: EMSI Q2 2015 Data Set; Garner Economics

Major Industry Competitiveness

The competitiveness screen seeks to reveal local competitive advantages (i.e., unique growth beyond predicted industry trends).

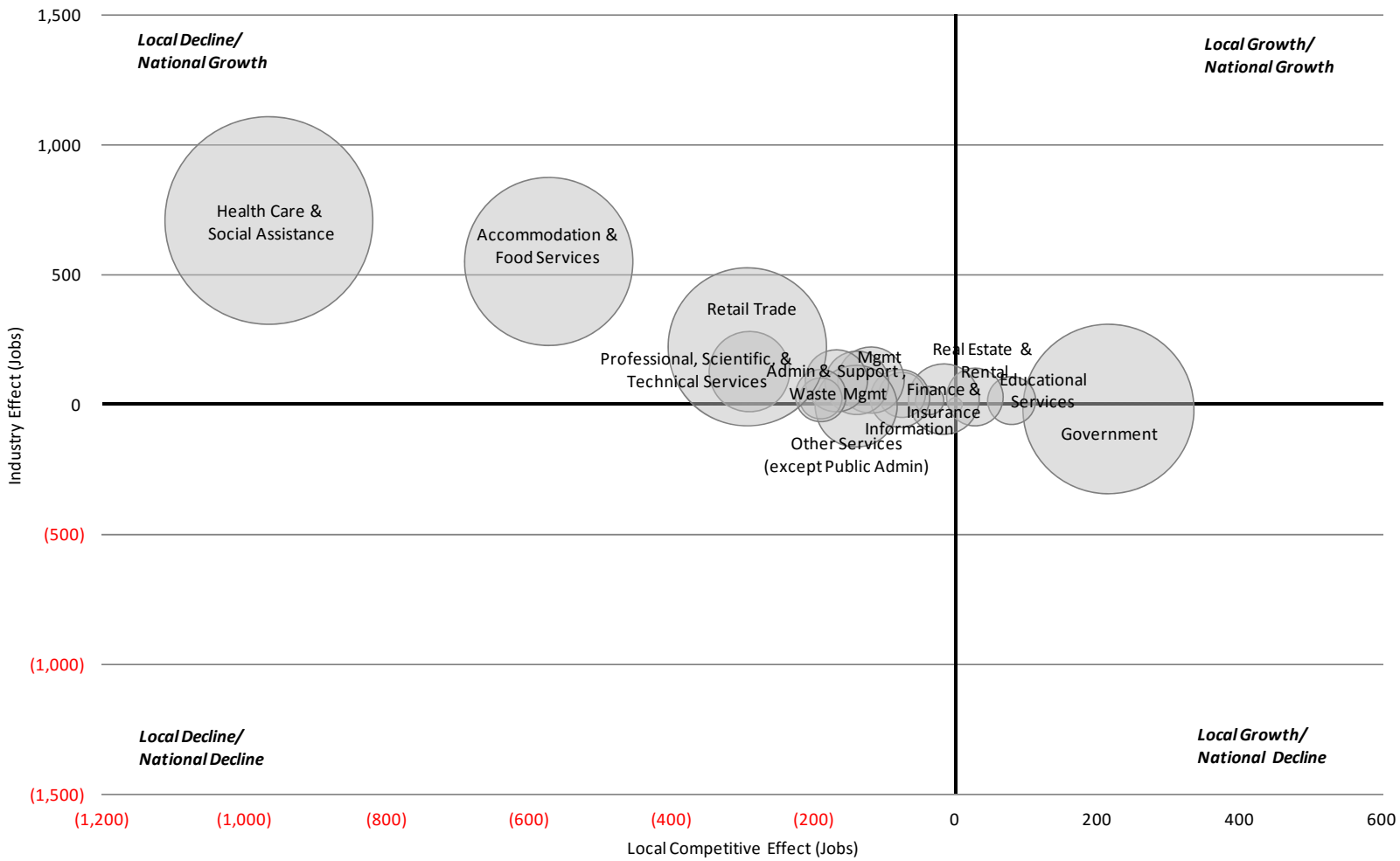
Observations: By this measure, *Government* was the strongest by far. The other main industry with strong local competitive effects was *Educational Services* (Figure 39 and Table 32). Fredericksburg demonstrated a positive local competitive effect in *three* of the 18 major industry groups. Fredericksburg's least competitive sectors were *Health Care and Social Assistance*; *Accommodation and Food Services*; *Retail Trade*; and *Professional, Scientific, and Technical Services*.

Table 32
Fredericksburg
Industry Relative Components of Growth, 2011-2015

Industry	Local Competitive Effect	Industry Effect	2015 Jobs
Local Growth/National Growth			
Educational Services	79	15	349
Real Estate and Rental and Leasing	26	29	494
Local Growth/National Decline			
Government	214	(19)	4,334
Local Decline/National Growth			
Utilities	(1)	0	30
Finance and Insurance	(17)	20	734
Transportation and Warehousing	(37)	15	128
Arts, Entertainment, and Recreation	(76)	35	313
Information	(79)	22	519
Management of Companies and Enterprises	(120)	95	652
Construction	(139)	80	601
Administrative and Support and Waste Management and Remediation Services	(168)	89	582
Manufacturing	(190)	22	260
Wholesale Trade	(190)	34	391
Professional, Scientific, and Technical Services	(290)	124	976
Retail Trade	(293)	220	3,727
Accommodation and Food Services	(573)	551	4,198
Health Care and Social Assistance	(965)	705	6,412
Local Decline/National Decline			
Other Services (except Public Administration)	(141)	(5)	997

Source: EMSI Q2 2015 Data Set; Garner Economics

Figure 37
Fredericksburg Industry Relative Components of Growth, 2011-2015



Size of the bubble represents total employment.
Source: *EMSI Q2 2015 Data Set; Garner Economics*

Occupational Specialization & Growth

Occupational groupings represent similar skills and educational qualifications, but not necessarily specific industry sectors.

Observations: The occupational groups of *Health Practitioners and Technical* and *Military* are competitive, as each experienced growth while exhibiting local specialization (Figure 40 and Table 32). One occupation that is emerging but has lower specialization is *Education, Training, and Library.* The occupational group has gained 183 jobs over the past five years. Six occupational groups with high specialization are at risk and 11 occupations are declining.

Table 32
Fredericksburg
Occupational Specialization & Growth, 2011-2015

Occupational Group	Five-Year Change	Location Quotient	2015 Jobs
Competitive			
Healthcare Practitioners and Technical	21	2.18	3,007
Military	8	1.23	412
Emerging			
Education, Training, and Library	183	0.91	1,323
Life, Physical, and Social Science	6	0.75	157
At-Risk			
Business and Financial Operations	(11)	1.01	1,280
Healthcare Support	(12)	1.36	974
Food Preparation and Serving Related	(14)	1.80	3,802
Legal	(16)	1.19	255
Community and Social Service	(75)	1.22	499
Computer and Mathematical	(110)	1.03	714
Sales and Related	(199)	1.19	3,150
Declining			
Installation, Maintenance, and Repair	(4)	0.62	609
Architecture and Engineering	(9)	0.41	177
Arts, Design, Entertainment, Sports, and Media	(10)	0.91	405
Protective Service	(11)	0.97	564
Building and Grounds Cleaning and Maintenance	(15)	0.67	657
Management	(32)	0.87	1,189
Construction and Extraction	(39)	0.47	546
Transportation and Material Moving	(83)	0.49	809
Production	(134)	0.26	410
Personal Care and Service	(184)	0.95	962
Office and Administrative Support	(189)	0.97	3,789

Source: EMSI 2015 Q2 Data Set, Garner Economics

Figure 38
Fredericksburg Occupational Specialization & Growth

Size of the bubble represents total employment.
Source: *EMSI 2015 Q2 Data Set, Garner Economics*

About Our Company

Garner Economics, LLC provides innovative economic and community development solutions in a competitive global market. We offer site selection, analytical research, industry targeting, strategic planning, and organizational development with a wealth of expertise to companies, communities, and organizations globally. Garner Economics is based in Atlanta, Georgia, and has representative offices in both Europe and Asia.

Since 2003, Jay Garner, a 35-year internationally recognized expert in the economic development, chamber of commerce, and site location consulting professions has headed our team, which is rounded out by talented experts.

Megan Baker, a research economist for Garner Economics, served as the author of the economic and labor analysis. Tina Valdecanas, Senior Associate and Strategist for Garner Economics, led the stakeholder input sessions and analysis. Jay Garner conducted the Assets and Challenges Assessment.

APPENDICES

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Appendix A: Focus Group Summary

The below summarizes the responses to the questions posed. With the exception of an additional question for the Employer group, each group was asked the same questions. Note: The below are comments from focus group respondents; they may not necessarily be a statement of fact, but represent an opinion or perception.

1. What are several words or phrases that describe Fredericksburg?

Overall, the four focus groups used positive words to describe the City of Fredericksburg, with all groups noting the City's historic charm and several noting its proximate location and friendly, small-town atmosphere.

Participants also noted the challenges of traffic and being so close to the I-95 corridor, as well as the levels of growth experienced and the developments downtown to describe the City.

Negative descriptions included that of a City "stuck in time," one that is landlocked, and one with not enough quality retail (especially in the downtown area).

Specific responses given were:

- Historic (4)
- Friendly (3)
- Community/small town (3)
- Great location (3)
- Livable (2)
- Transportation corridor (2)
- Stuck in time (2)
- Growing (2)
- Family friendly (2)
- Antique stores/hobby shops (2)
- Traffic/transportation issues (2)
- Downtown (2)
- Walkable
- Up-and-coming
- Artistic
- Not as welcoming
- Quaint
- Quality
- Opportunistic
- River access
- Neighborhoods
- Crime
- Blessed/fortunate
- Poor compared to surrounding counties
- Public transportation
- Diverse
- Landlocked
- Attractive
- Bedroom community
- College town
- Diverse

2. What do you think are some of the biggest obstacles that inhibit the City of Fredericksburg in its ability to attract, expand, or retain businesses and investment?

All four focus groups noted the lack of available land, sites, and office space as an inhibitor to attracting, expanding, or retaining businesses in the City. Other inhibitors noted by at least three of the groups were: the level of bureaucracy in the City (especially permitting), traffic, and the lack of parking. Inhibitors mentioned by at least two of the groups include the existence of Business Professional Occupational Licenses, a perceived lack of communication/cooperation among City entities, ordinances pertaining to historic buildings, and the City's low average income compared to surrounding jurisdictions.

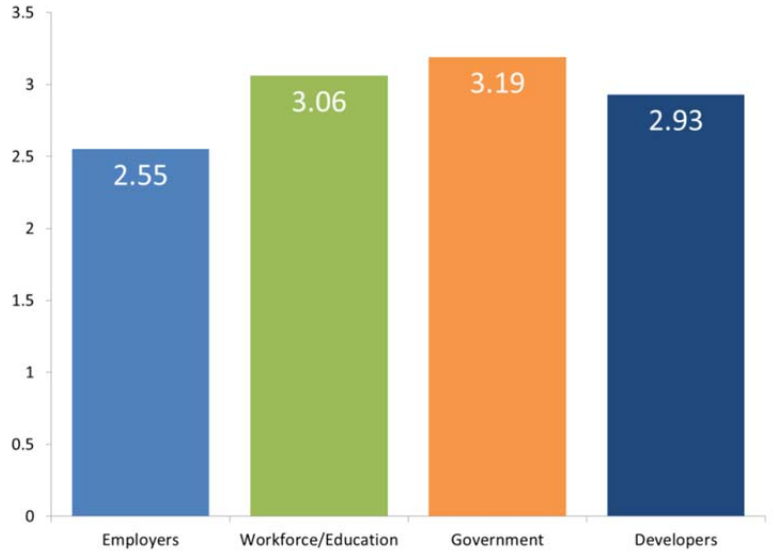
Individual groups commented on the effects of not having a major corporate presence (i.e., large numbers of out-commuters), a perception that Fredericksburg is becoming generic and lacks uniqueness, and several comments regarding the difficulty of doing business in the City.

Specific responses given were:

- Lack of available land/offices/sites (4)
- Permitting/bureaucracy (3)
- Traffic (3)
- Lack of parking (3)
- Located on congested transportation corridor (3)
- Lack of communication/cooperation among City entities (2)
- Historic preservation ordinances (2)
- Demographic—City has lower average income (2)
- Business Professional Occupational Licenses (BPOL) (2)
- City doesn't know what it wants to be
- Starting a business is challenging
- Zoning
- Lack of economic diversity/too much retail
- Lack of uniqueness
- Abscence of a major corporate presence
- Lack of appropriate jobs for residents/high out-commuting
- Distance from airports
- Problem breaking with tradition
- Lack of a conference space to bring large groups
- Perception of having an unskilled workforce for certain industries
- Lack of strong connections between the business community and university
- High cost of living relative to local wage rates
- High percentage of residential rentals

3. On a scale of 1 to 5, with 5 being best, how would you rate the business climate of City of Fredericksburg?

Among all of the focus group participants, the average score given was 2.93. By focus group, the average score was as follows:



If the Government focus group is extracted, the average score would be 2.83. Given the ranking scale provided, a score of 3 would be considered average.

When asked for reasons behind the rankings, focus group participants most frequently mentioned the lack of consistency in policies, the poor execution of that policy by City departments, and the lack of latitude taken in interpreting and enforcing outdated or unclear codes. Examples given include problems in renovating historic façades downtown and meeting parking space requirements. Several focus group respondents blamed such inconsistency on the lack of a vision or strategic plan for the City and poor execution of existing plans (e.g., the updated Uniform Development Ordinance). Some also noted that the lack of a clear vision has resulted in an oversaturation of low-end retail downtown and generic retail development outside of downtown.

Other comments include that the Economic Development Department staff does not have adequate authority over other City Departments and is often pulled in several directions by the City Council and the appointed Authority members. Participants note that the staff of several of the City Departments lack a sense of customer service and do not appreciate the speed at which businesses need to have decisions made. They note that, as a result, businesses have learned how to “work around” the City to push for permitting to be expedited or approved.

Focus groups also reiterated the negative impact of the BPOL and a perceived fear/hesitancy by the City leadership to go in a new direction.

On a positive note, two of the focus groups noted the good intentions of several within the ED Department and other City staff in trying to help clients.

4. What do businesses need that they can't find in Fredericksburg?

Focus group respondents had a variety of responses to these needs. In terms of physical or tangible needs, parking in the central business district was the most frequently mentioned gap. Other needs include redundant power and Internet sources, tax incentives or any kind of business incentive, Class A office space, a stronger and better-maintained road infrastructure within the City, and non-traditional financing sources for startups.

Specific responses included:

- Class A office space (3)
- Downtown parking (2)
- Easy mechanism/support to deal with City departments (2)
- Tax incentives or any kind of business incentive (2)
- Redundant power and Internet sources
- Missing health care specialties
- Dark fiber
- 21st Century infrastructure in historic district

Focus group respondents also noted that businesses in Fredericksburg do not have (and would benefit from) consistency in dealing with the local government, zoning aligned with current needs and the City's vision, and a single point of contact or easier mechanism for getting their projects approved by the City.

- Consistency in dealing with local government
- Zoning aligned with current needs/future vision
- Citywide walkability
- Strong road infrastructure
- Lack of focus on non-downtown areas
- Large market/customers
- Attractive retail space
- Non-traditional financing

5. What do you see as Fredericksburg's strengths?

Participants of three focus groups noted the City's quality of life, geographic location, and access to good health care as strengths. Other responses frequently noted include the City's access to outdoor recreation, workforce and highly educated population, access to I-95, the downtown, and a growing population. The also noted the existence of the University of Mary Washington in the City's core.

Responses provided by at least one of the groups include Fredericksburg's designation as a HUBZone, its diversity, and the access to the Virginia Rail Express (VRE) rail and water.

Specific responses included:

- Quality of life (4)
- Geographic location (4)
- Good health care (4)
- Great recreation (3)
- Great workforce (3)
- University of Mary Washington (3)
- Highly educated population (3)
- Access to I-95 (2)
- Downtown (2)
- Availability of customers/growing population (2)
- Good schools (K-12, community college, university) (2)
- Reasonable cost of living
- Strong vision and goals for the City
- Affordable housing
- Tourism
- Located in a HUBZone
- Access to rail—VRE
- Regional airport
- Close to water/rivers
- Unique
- Innovative
- Diversity

6. How do you see the current labor situation in the area (both quality and employee attraction and availability)? Note, this question was only asked of the Workforce Group.

Participants in the Workforce group noted that Fredericksburg does not have a lack of skilled workers, but that most residents who possess those skills leave the City to work in other jurisdictions (out-commuters). These workers are drawn to Fredericksburg because of the relatively lower cost of housing and good quality of place, but work elsewhere due to better job opportunities and higher wages.

Some noted that there is a portion of the City's high-school student population that is being "left behind," with weak soft-skills and are not being prepared for STEM-based jobs. They note that those students would benefit from internships or mentoring.

7. What infrastructure is missing or unsatisfactory in the City?

Several of the responses provided for this question reflect the sentiments shared in Question 4 regarding things that businesses cannot find in Fredericksburg. Among the most frequently noted are more frequent VRE service, wayfinding and signage, public access to the river, site-ready locations, and an improved internal road system.

Other responses centered around amenities and space that would attract business and talent to the community (e.g., support for cultural resources, a professional athletic team, a stronger community center, an updated industrial park plan, etc.). Finally, participants noted the need for a regional plan to update and strengthen the City's and other surrounding infrastructure needs.

Specific responses to the question on infrastructure needs included:

- More frequent train/VRE service (3)
- Wayfinding/signage (3)
- Downtown parking (3)
- Dredged river/access to river (2)
- Better internal road system (2)
- Site-ready locations (2)
- Specialized health care
- Overriding strategy to build and maintain infrastructure
- Lighting along paths
- Performing arts venue
- Support for historic sites
- Regional approach to economic development
- Support for cultural resources
- Another river crossing
- Professional athletic team
- Stronger community center
- High speed broadband fiber
- Underground utility lines
- An industrial park to meet current needs/vision
- Sidewalks
- Class A office space

8. What would you work to change about the community, not worried about money or politics?

Responses to this question centered on ways to increase job opportunities in the City (by both recruiting companies and strengthening the City's business climate) and building the partnerships regionally and internally to allow Fredericksburg to leverage its many assets and create more job opportunities. Another common theme of the responses is a desire for the City to create and execute a consensus vision for its future.

Specific responses included:

Business attraction and retention efforts

- Attract more corporate employers to lessen out-commuting patterns (3)
- Find a way to better link the business community and university
- Build the capacity/capability to carry out plans
- Develop targeted Class A office space

Other

- Build true regional cooperation (2)
- Improve the economic viability of all citizens

Product improvement efforts

- Maximize use of the river (3)
- Improve traffic and accessibility along the I-95 road and rail corridor (2)
- Build a strong downtown and have appropriate development elsewhere (2)
- Protect the historic and small town character of City (2)
- Build an integrated trail system
- Solve gridlock on all interior streets
- Alleviate the parking issues
- Build high density mixed-use around the train station
- Increase the quality of schools in the City
- Implement a regional gas tax to pay for the transportation infrastructure
- Improve the hospital
- Eliminate Business Professional Occupational Licenses
- Improve the City bus service
- Improve walkability
- Place all electrical lines underground
- Redevelop corridors that are slightly outside of downtown
- Improve the homeownership versus rental ratios
- Create a downtown that the entire region uses
- Create a pedestrian corridor downtown

9. Give some examples of unique and innovative programs or initiatives that you believe are having a positive impact on increasing the competitiveness of the City?

Respondents provided examples of both improvements to the City's product and policies and initiatives underway. In regard to improvements, participants noted the new trail system, improvements to some streets, and the start of projects to better utilize and provide access to the river. Regarding programs or initiatives, participants noted the programming for startups (e.g., Startup Boot Camp, Made in FredVA, FredExchange, etc.), the Main Street program and other downtown initiatives, the partnership between the University of Mary Washington Foundation and local development, recent initiatives that link the greenway to the historic sites, the downtown grants program, efforts by the Small Business and Technology Development Center to better link the university and City in sharing economic information, and efforts to attract more arts and cultural activity.

10. Are there programs in peer/competitor regions that Fredericksburg should consider for the City? If so, give examples.

Responses to this question focused on policies the City could adopt and strategies for strengthening downtown and the City's overall product.

For policy examples, participants cited cities and other jurisdictions that have a single point of contact or an ombudsman to support businesses, cities that have built and supported "innovation districts" to foster their startup community, and city-based incentive policies.

For strategies pertaining to product improvement, the cities cited were Chattanooga, Tennessee (bridge); Nashville, Tennessee (central parking areas); Winter Park, Florida; and Carmel, California (in terms of supporting high-end retail); Charleston, South Carolina; and Beaufort, South Carolina (river front development); Savannah, Georgia (leveraging the Savannah College of Art and Design to jump-start downtown development); Charlottesville, Virginia; Winchester, Virginia; and Boulder, Colorado (pedestrian mall); Culpeper, Virginia (encouragement of B&Bs); Alexandria, Virginia (art fair); Greenville, South Carolina (leveraging a water asset and growing retail/hospitality); Washington, DC; and Denver, Colorado (pocket parks and caring for the environment); and Harrisburg, Pennsylvania (leveraging historic assets).

11. What types of companies do you think would be a good fit for the area?

Most suggestions centered around business sectors whose work can be done remotely or via telecommuting and sectors that would leverage Fredericksburg's quality of place and make the City more distinct. Specific responses included:

- Government contractors (3)
- Specialty retail (3)
- Technology-driven companies (2)
- Medical/health care (2)
- Professional business services (2)
- Engineering and design
- Jobs that can be done virtually
- Restaurants and microbrewers
- Cybersecurity
- Technical service support
- Small-scale arts and crafts
- Software

12. What are your past experiences with, and current perceptions of, the various economic development efforts by group(s) involved in investment attraction, retention, and assisting entrepreneurs? How could these efforts or groups be improved?

The majority of participants that voiced an opinion regarding the economic development organizations in the region believe that they are as good as they can be, but that the problem lies in a lack of true regionalism. Several blame the political leadership for the collaboration being more of a discussion than true implementation. Participants see true regional collaboration as a way that Fredericksburg can build the type of infrastructure it needs to strengthen its business climate and differentiate itself from competing areas. They suggest that a regional approach could be taken in the way school districts are established also. Several participants also noted improvement with the Fredericksburg Regional Alliance under its new leadership.

Regarding the staff of the Economic Development Department, participants believe that the staff has good intentions, but that it is over-taxed and lacks authority or tacit clout over other City Departments that facilitate the development or investment process, especially compared to other jurisdictions in the Commonwealth (e.g., Fairfax). Some participants also noted that the combined mission to serve economic development and tourism makes staffing difficult, as the two often require different skills sets. Other participants noted the need for a seasoned economic development practitioner if the City is to be more proactive in economic development efforts so as to have a person with the skills, experience, and authority to drive the change needed.

A final theme of discussion among the focus groups is the lack of a community vision to drive efforts.

13. Are there any other issues of concern to you?

At the conclusion of each focus group, participants were asked if there are other issues affecting the City that Garner Economics should be aware of as we help craft the economic development strategy. Among the themes suggested and those arising among the discussion around the above questions are:

- **Segregated nature of Fredericksburg:** Participants noted that the City often has to orchestrate events to get different groups of residents to get together. They note that, since Fredericksburg has such a large out-commuting population, there tends to be a "work" world and a "home" world, without much intermingling of the two. Other participants noted that there seems to be a divide between the "Come here"/transplants versus natives or long-term residents of Fredericksburg.
- **Structure of the government as an impediment:** In addition to the comments suggesting that the economic development and tourism functions of the City should be split, more than one group noted the structure of the City Council (voted by district and not at-large) as an obstacle.
- **Other effects of having a small land mass:** Participants note that cities are incorporated separate from counties in Virginia. They note that this is a burden for a city the size of Fredericksburg since the City has to take care of much of its infrastructure based on a small tax-base. They note that this incorporation places a burden on smaller cities that do not have the economy of scale to be efficient.
- **Need for an increased focus on tourism:** A few participants noted the strong historic and natural assets that Fredericksburg has and suggested that the City should focus more on tourism—especially building up Fredericksburg as a regional destination for overnight visitors—than on traditional economic development. This group suggested that Fredericksburg look to Williamsburg and its tourism development.

APPENDIX B: Focus Group Participants

Development Community

- Mike Adams, JON Properties
- Steve Carboni, Rappaport
- Rob Burke, Wells Fargo
- Mike Degen, Cushman & Wakefield | Thalhimer
- Adam Fried, Atlantic Builders
- Hunter Greenlaw, GLMG
- Wilson Greenlaw, Cushman & Wakefield | Thalhimer
- Wally King, Virginia Partners Bank
- Tommy Mitchell, Property owner
- Virgil Nelson, Cushman & Wakefield | Thalhimer
- Gary Nuckols, Hirschler Fleischer
- Jamie Scully, Cushman & Wakefield | Thalhimer
- Ed Whelan, Mill District
- Andy Withers, Union Bank & Trust

Workforce and Education

- Brian Baker, UMW Center for Economic Development
- Janel Donohue, Rappahannock United Way
- Richard Finkelstein, UMW
- Rick Pearce, UMW
- Lynne Richardson, UMW
- Todd Gillingham, Fredericksburg Regional Alliance
- Timothy Schilling, UMW Center for Economic Research
- Susan Spears, Fredericksburg Regional Chamber of Commerce
- Donnie Tolson, Rappahannock Goodwill Industries

Government and Elected Officials

- Jim Beavers, Planning Commission
- Bob Carter, EDA
- Timothy Duffy, City Council
- Brad Ellis, City Council
- Charles Johnston, Planning Director
- MK Greenlaw, City Council
- Matt Kelly, City Council
- Amy LaMarca, EDA
- Erik Nelson, City Planning Office
- Mark Whitley, Assistant City Manager
- Joe Wilson, EDA
- Billy Withers, Jr., City Council

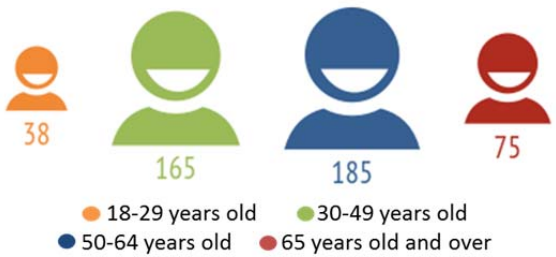
Employers and Entrepreneurs

- Beth Black, Foode/Mercantile
- Mike Brown, Sugar Shack Donuts
- Jason Cohen, ILM Corp.
- Anne Darron, Washington Heritage Museums
- Ken Fried, Fairfield Technologies
- Ronnie James, Homewood Suites/Hampton Inn
- Steve Judy, Woehrle Dahlberg Jones Yao
- Stacey Lampman, Spaces Design Studio
- Lucy Lawliss, National Park Service
- Dr. Michael McDermott, Mary Washington Healthcare
- April Peterson, River Rock Outfitters
- Richard Harrison, CodeHERO
- Dori Eglevsky, Keystone Coffee & Auto Spa

APPENDIX C: Electronic Survey Results

Survey Respondents (n=469)

By Age



By Residence v. Place of Work

- **Live and work in Fredericksburg** **158**
- **Live in Fredericksburg, work close** **89**
- **Live and work close to Fredericksburg** **43**
- **Work in Fredericksburg, live close** **20**

- Live in Fredericksburg, work far 55
- Live close to Fredericksburg, work far 8
- Work in Fredericksburg, live far 32
- Work close, live far 28
- Neither live nor work close 36

1. What words or phrases describe the City of Fredericksburg? (Choose up to five responses)

Response option	# rec'd
Historic	**369**
Downtown	230
Walkable	171
Traffic/transportation issues	146
Community/small town	141
College town	139
Good quality of life	138
Up-and-coming/growing	120
Great location	111
Family friendly	104
Antique stores/hobby shops	103
River access	90
Attractive	84
Bedroom community	64
"Stuck in time"	48
Other	43
Transportation corridor	35
Diverse	31
Poor economically compared to surrounding counties	23
Small geographic footprint	23
Not welcoming	22
Crime	14

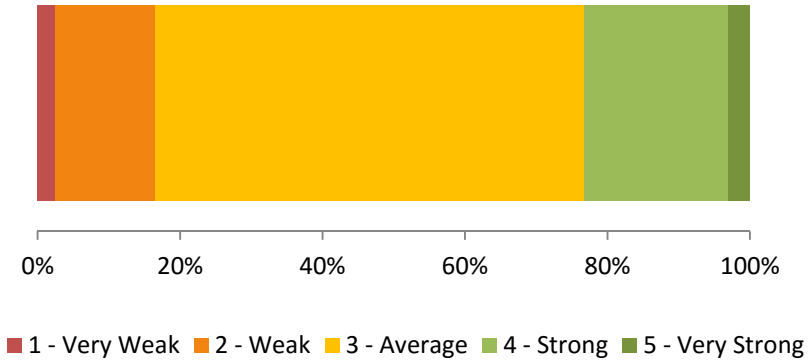
Other responses:

- Place for the arts/artists
- Wanting to be something it should not be
- Great shopping
- High tax
- Southern
- No central hub
- Not welcoming to small business
- Provincial
- Aging surrounding neighborhoods
- HUBZone firm-friendly
- Born in Fredericksburg/home
- Unique restaurants/shops in Old Town Fredericksburg
- Art destination
- Great schools
- Out of scale new buildings
- Nationally highly ranked library system
- Incompetent, inept
- Business unfriendly
- Lots of potential
- City of Special Events
- Riverside trails with river views
- Regional impact
- Unkempt, expensive eateries
- Birthplace of our nation
- No clear definition of self

2. What do you think are some of the biggest obstacles that inhibit Fredericksburg in its ability to attract, expand, or retain businesses and investment? (Choose up to five responses)

Response option	# rec'd
Lack of appropriate jobs for residents/high out-commuting	**189**
Lack of parking	173
City doesn't know what it wants to be/lack of vision	147
Permitting/bureaucracy/zoning ordinances	138
Traffic	135
High cost of living relative to local wage rates	130
Located on congested transportation corridor (I-95)	114
City seems to have a problem breaking with tradition	103
Absent of a major corporate presence	88
Lack of communication/cooperation among City entities	69
Lack of economic diversity/too much retail	67
Distance from airports	62
Starting a business is challenging	61
Demographics—City has lower average income than surrounding area	59
Other	58
Lack of strong connections between the business community and university	57
Historic preservation ordinances	52
Lack of available land/offices/sites	47
Business Professional Occupational Licenses (BPOL)	41
Perception of having an unskilled workforce for certain business sectors	40
Lack of a conference space and hotels to bring large groups	39
High percentage of residential rentals	32
Lack of uniqueness	7

3. On a scale of 1-5, with 5 being "Very Strong," how would you rate the business climate of Fredericksburg?



4. What do businesses need but cannot find in the City of Fredericksburg? (Choose up to five responses)

Response option	# rec'd
Parking	**254**
21st Century infrastructure in historic district	179
Easy mechanism/support to deal with City departments	170
Large market/customers	149
Tax incentives or any kind of business incentive	136
Class A office space	80
Attractive retail space	78
Redundant power and Internet sources	64
Certain professional services	59
Non-traditional financing	50
Other	47
Dark fiber	38
Missing health care specialties	34

Other responses:

- Advertising by the city?
- Diversity of business
- New businesses need welcoming attitude from community and government
- Outlet retail shops
- Solution to traffic problems
- Tax breaks
- Public parks/seating
- Inexpensive rent or lease options
- Affordable space
- More flexible health department rules to allow (food) safe alternative food venues
- Develop Riverfront
- A mature council
- Vision and leadership
- Consistently loyal customer base

5. What do you see as the City's strengths? (Choose up to five)

Response option	*# rec'd*
Downtown	**260**
Access to rail—VRE and Amtrak	239
Geographic location	234
Quality of life	201
University of Mary Washington	192
Access to I-95	173
Tourism	168
Close to water/rivers	132
Reasonable cost of living	90
Good schools (K-12, community college, university)	72
Unique	69
Great recreation	62
Good health care	50
Availability of customers/growing population	45
Highly educated population	41
Located in a HUBZone	27
Other	26
Diversity	23
Great workforce	14
Regional airport	10
Strong vision and goals for the City	5
Affordable housing/health care	5
Innovative	2

Other responses:

- Arts
- History
- Nice people
- Running /walking trails
- Part of strong region for stronger solutions
- Staff
- Regional library system
- Nice place to live—canal path, community, farmers markets, etc.
- Clear sense of identity
- Entrepreneurial support system

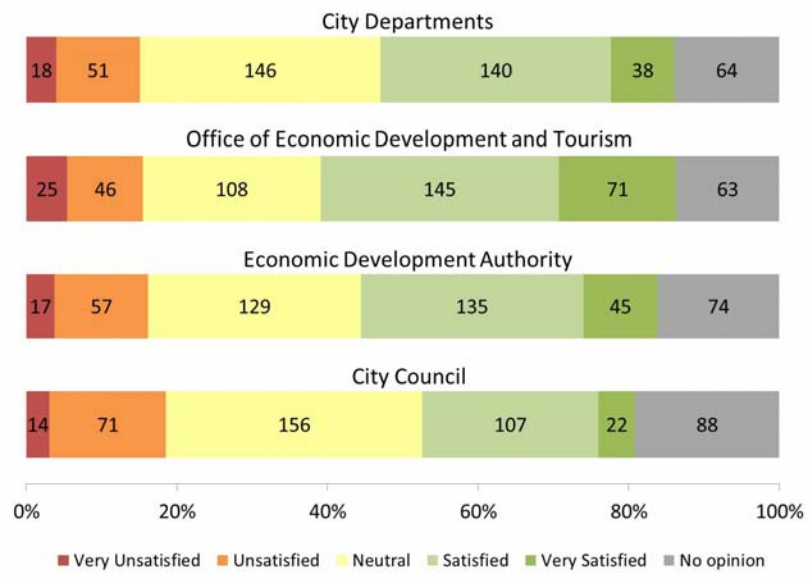
6. For the purposes of this question, hard infrastructure is defined as the physical networks such as roadways, sewer, broadband Internet, airports and/or ports; soft infrastructure refers to institutions or places that support the economic, health, and cultural climate of a place, such as the education system, the health care system, system of government, and/or parks. What hard or soft infrastructure is weak or missing in Fredericksburg? (Choose up to five responses)

Response option	# rec'd
Parking	**222**
More frequent VRE/Amtrak service	160
Performing arts venue	158
Dredged river/access to river	146
Another river crossing	143
Overriding strategy for infrastructure	109
Support for historic sites	101
Underground utility lines	99
Better internal road system	91
Lighting along paths	89
Broadband fiber	85
Support for cultural resources	75
Class A office space	55
Site-ready locations	45
Professional athletic team	43
Other	39
Sidewalks	38
An industrial park to meet current needs/vision	33
Wayfinding/signage	32
Specialized health care	31

Other responses:

- Downtown mall
- Specialized veterinary care
- Riverfront walk, playground, marina, and amphitheater
- A more functioning rail station
- Aggressive marketing program
- Affordable housing
- More frequent VRE service (including weekends)
- Additional permit and plan review staff
- Community recreation facilities
- Downtown grocery store
- High school football field
- Class A public transit
- Live music venue
- Another river crossing
- Better access to airport
- Emergency services 24/7
- College football team
- Support for the arts
- Crime prevention

7. What are your past experiences with, and current perceptions of, the various entities within the City involved in business investment attraction and retention?



8. What types of companies do you think would be a good fit for the area (Select all that apply)?

Response option	# rec'd
Government contractors	**273**
Specialty retail	211
Jobs that can be done virtually	174
Technology-driven companies	254
Medical/health care	177
Regional office operations	161
Engineering and design	202
Professional business services	189
Restaurants and microbrewers	217
Cybersecurity	149
Technical service support	119
Small-scale arts and crafts	185
Software	111
Other	24

Other responses:

- Paper goods
- Manufacturing
- Contractors
- High-end movie theatre, performance center
- Federal lobbyists
- A Fortune 500 company
- Recreation & culturally oriented companies
- Large scale arts
- Environmental service providers
- Small businesses

9. Give some examples of local, unique, and innovative programs or initiatives that you believe are having a positive impact on increasing the competitiveness of the City? In other words, what things is the City doing well to attract/retain businesses and talent?

Support for entrepreneurs/small business

- HUBZone
- Tourism and Technology Zone Incentives (Technology Zone should be citywide)
- Tax/other incentives
- Strong Chamber of Commerce/relationship to the business community
- Startup weekends
- Mary Washington SBA programs
- Made in FredVA, JumpStart, NextGen etc.

Work to build amenities

- Walking trails, signage, local arts events
- Riverfront exposure
- Virginia Main Street, Fairgrounds events
- Mixed-use development downtown and in Eagle Village
- Libertytown arts center
- Children's museum
- The streets and sidewalks are clean and clear from debris, trash
- First Night for New-years
- EDA and City projects, especially the arts
- Schools—class sizes are very competitive, way better than the county
- Via Colori, Celebrate Virginia
- Investing in bicycle infrastructure, since this is a bikeable city
- CLEAR plan, watershed easements, riverfront enhancements

Initiatives to lessen congestion

- VRE rail and hot lanes on 95
- Falmouth intersection completion
- Attempts to alleviate traffic congestion on Rt. 1.
- Attempting to improve river access

Economic Development

- Initiative between City and UMW to develop business partnership and attraction
- Incentives for businesses to improve their shop façades/appearance
- Granting economic development funds
- Economic development team is active and plugged in, bringing in new business; winery tours and breweries are attractive to tourists
- Department of tourism does a good job in uniting local businesses such as restaurants to drive business

10. Are there programs in peer/competitor regions that you've seen that the City of Fredericksburg should consider for this area? Please give examples.

Examples of Venues

- Wolf Trap outdoor/indoor pavilion (Vienna, Virginia)
- Downtown pedestrian malls (Burlington, Vermont)
- Torpedo Factory (Alexandria, Virginia)

Examples to leverage historic character

- Williamsburg, Virginia
- Bedford, Virginia
- Appomattox, Virginia
- Winchester, Virginia
- Manassas, Virginia
- Pittsburgh, Pennsylvania
- Charleston, South Carolina

Working with Education/Higher Ed

- Charlottesville, Blacksburg, and Lynchburg, Virginia (educational)
- Lancaster, Pennsylvania
- Fairfax, Virginia (George Mason)

Cities that have branded themselves

- Staunton, Virginia
- Columbus, Ohio
- Colorado Springs Regional Economic Development Corporation (Colorado Springs, Colorado)
- Naperville, Illinois
- Lockport, New York
- Austin, Texas
- Winston-Salem, North Carolina

Areas that confront traffic challenges

- Metro (Washington, DC)
- TIDE (Norfolk, Virginia)
- Charlottesville, Virginia and Baltimore, Maryland (public circulation system)

Cities that have improved walkability

- Charlottesville, Virginia
- Spotsy Town Centre Village, Virginia
- Cumberland, Maryland

Riverfront developments

- Greenville, South Carolina
- Beaufort, South Carolina
- Richmond, Virginia (Canal Walk)
- Olde Town Alexandria, Virginia
- Norfolk, Virginia (Waterside and Town Point Park)
- San Antonio, Texas
- Charleston, South Carolina

Corporate recruitment programs

- Richmond, Virginia
- York, Pennsylvania
- Tysons Corner, Virginia
- County Tax relief: Montgomery County, Maryland; Fairfax County, Virginia; Arlington County, Virginia; Loudoun County, Virginia

Peer programs, continued

Citywide festivals/events/arts

- Culpepper, Virginia
- Asheville, North Carolina
- Arlington, Virginia (BeerFest)
- Fort Myers, Florida
- Charlotte, North Carolina (Bike rental)

Cities that support entrepreneurs

- Business Network Innovation Center (Montgomery County, Maryland)
- International Business Groups/Programs (Fairfax County, Virginia)
- Green business challenges (Loudoun County, Virginia)
- Healthy Business Recognition programs (Sonoma County, California)

Retail/Open shopping

- Woodbridge, Oregon (Stonebridge)
- Richmond, Virginia (Short Pump)

Greenspace

- Research Triangle Park, North Carolina
- Philadelphia, Pennsylvania
- New York, New York
- Washington State
- Oregon State

11. Often, economic development change begins with setting priorities and creating a vision. Without worrying about money or politics, please indicate the top 5 items you would like to see the City leadership take on to strengthen its ability to attract and retain quality companies and talent to Fredericksburg. Use 1 to indicate the most important item.

Initiative Option	Ranked First Priority	Ranked Second Priority	Ranked Third Priority	Ranked Fourth Priority	Ranked Fifth Priority	% Ranking Issue in Top 5
Improve traffic and accessibility along the I-95 road and rail corridor	15.3%	7.8%	5.9%	5.8%	2.9%	37.7%
Protect the historic and small-town character of City	14.2	8.3	6.1	6.7	6.9	42.2
Alleviate the parking issues	8.4	7.1	7.4	6.7	7.1	36.7
Attract more corporate employers to lessen out-commuting patterns	8.0	7.1	8.1	8.6	6.4	38.2
Create a downtown that the entire region uses	7.8	6.3	5.6	6.9	6.9	33.5
Build true regional cooperation	6.7	5.4	2.9	4.4	4.3	23.7
Build a strong downtown and have appropriate development elsewhere	5.3	8.9	5.2	3.9	5.0	28.3
Increase the quality of schools in the City	4.2	2.9	4.5	3.2	3.8	18.6
Redevelop corridors that are slightly outside of downtown	4.0	6.0	6.3	6.9	6.2	29.4
Maximize use of the river	3.3	6.9	7.0	10.0	8.6	35.8
Build the capacity/capability to carry out plans	3.3	2.2	2.0	1.9	3.6	13.0
Eliminate Business Professional Occupational Licenses	2.9	2.5	2.5	1.4	3.1	12.4
Improve economic viability of all citizens	2.7	2.9	3.8	3.0	3.3	15.7
Implement a regional gas tax to pay for the transportation infrastructure	2.0	1.3	1.6	2.3	2.4	9.6
Improve the homeownership versus rental ratios	2.0	2.0	3.8	2.5	2.9	13.2
Create a pedestrian corridor downtown	2.0	4.2	3.4	1.6	2.4	13.6
Solve gridlock on all interior streets	1.3	2.7	2.7	2.5	1.7	10.9
Build high density mixed-use around the train station	1.3	2.7	4.7	3.7	3.1	15.5
Place all electrical lines underground	1.3	2.0	2.7	3.0	4.8	13.8
Develop targeted Class A office space	1.1	0.9	2.7	1.6	2.9	9.2
Find a way to better link the business community and university	0.9	2.2	3.4	3.0	4.5	14.0
Build an integrated trail system	0.7	1.8	2.3	3.7	2.4	10.9
Improve walkability	0.7	3.1	2.0	1.9	1.9	9.6
Improve the City bus service	0.4	2.0	2.5	2.3	1.7	8.9
Improve the hospital by including more specialty practices	0.2	0.7	0.9	2.3	1.7	5.8

13. Are there any other issues that should be examined as we undertake our economic development analysis of the City of Fredericksburg?

Encourage diversity

- Increase the diversity of the regional demographics. Our communities around the region offer little to the 21-30 population.
- More diversity in local entertainment and types of restaurants

Fully utilize the river

- The river could be a HUGE asset to the city and bring recreation up and down the river instead of isolated spots. The development of Riverfront Park will bring users from within the City and all surrounding areas to downtown. This should be high on your priority list.
- The City spends an enormous amount of time focused on "downtown" as if downtown will solve all of our economic problems. That focus is entirely misplaced. Focus for economic development on a larger scale should be along the Rt. 3 and Rt. 1 "gateway" corridors into the City. This is where the land can be found and repurposed for modern development that most businesses are going to need and will provide plenty of access and parking. Eagle Village is the best example of this, but look at all of the "trash" near Rt. 3 and I-95 ... lots of land with great potential. Keep downtown the charming place it is, but not the central hub of larger-scale economic development that Fredericksburg really needs.
- The City is so divided. Downtown and the rest. While downtown is a great location, the rest of Fredericksburg seems neglected.

More support for city services and businesses

- Tax rates need to be high enough to support schools and services, else why would anyone want to move here?
- Our experience has been that there is no local support network for starting a "big" business in Fredericksburg. No legal firms, no accounting firms, no investor networks, no support for early stage businesses without going out of the area.
- Small business aid and guidance that does not require a full-time employee to understand and implement, the paperwork for any help is so exhausting that a small business cannot dedicate the time and resources to find and receive any guidance.

Strategic development

- Selecting the proper land-use pattern is crucial. The classic pattern of suburban sprawl will harm the City and must be avoided. I would strongly advocate for the use of a form-based code similar to what is in use in Virginia Beach.
- "Revitalization of the Princess Anne corridor!" One of the main gateways into the Downtown District should be a main focus. This should be a key business district and employment center, which has remained stale for years.
- We need better/newer office space to attract corporate employers. What we would grade as class A office space in the City of Fredericksburg is at best lower class B in most Northern Virginia markets."
- Reduce red tape for new businesses, increase tax incentives

Strategic development, continued

- Protect the historic core. Do not promote the "colonial" Fredericksburg only; we have great neighborhoods that range from the late 19th to early 20th century. These should be promoted alongside the older buildings. Consider expanding the historic district.
- Understand the nature of the community and the aspirations of the citizens of the region before initiating a prioritized economic development plan.

Balance between preserving historic nature and growth

- Preserve the historic importance of Fredericksburg. The town is well and strategically situated; separate the historic downtown from commercial activities. They already are separated, emphasize this. Another bridge across the Rappahannock from route 17 to the Wegman's area and mall would help and would change the demographics of the town, which would also help.
- Please consider funding an economic study of historic preservation in this community, like has been conducted for great cities like Savannah! http://businessinsavannah.com/bis/2015-06-07/zapp-study-finds-historic-preservation-pays
- Let's spend some money on billboards to attract travels to downtown.
- In addition to the historic preservation activities, engage the brainpower inherent in the college community in discussions and decisions about city maintenance and growth.
- Keep the historic district historic. Perhaps study how Williamsburg manages its historicity while developing a viable downtown merchant area. Does UMW have a SBDC?
- Keep downtown local and without chain businesses or businesses like "Orion" that feel "this small town can't handle its big city concept," but build up just outside and around (but plan a layout better than Central Park's).
- It is very important to protect Fredericksburg's historic character. It's what makes us different and attractive.
- Embrace the historic aspect of the City but don't foster businesses that are old and irrelevant. Fredericksburg wants to be Brooklyn, but it's not cool at all. It's not Brooklyn.
- The trick will be to preserve the historic flavor and attributes while improving accessibility and infrastructure. The plan needs to be comprehensive in its approach—so that by solving one problem, you don't create others.

Creating a vision for Fredericksburg and its place in the region

- I think it would be good for city politicians and bureaucrats to engage in an all-in series of strategy sessions to agree on who we are as a city, and all agencies focus together and communicate better to make sure that not only a particular department can thrive, but that the entire city can thrive and achieve the goal of a successful, well-balanced, historically significant element of the Commonwealth.
- Don't worry about making everyone happy—do what's best for the City as a whole!
- A regional economic development strategy needs to be given consideration. Entirely too much us (city/county) versus them (county/city) leadership from the government officials taking place. The existing non-governmental alliances and organizations need to strengthen and rethink their approaches. It's time for the private sector to lead the drive towards growth.
- A comprehensive infrastructure and maintenance program
- Think regionally, i.e., what is the City's role within the region? Does the City want to be the lead, or the facilitator, or the consensus builder, or the isolationist?

APPENDIX D: 2015 Fredericksburg Industry Details

Highly specialized industries (location quotients greater than 1.2) and high relative earnings (above $48,532, the national average earnings per worker) are highlighted.

Industry	2015 Jobs	Five-Year Change	LQ	Average Annual Earnings
Utilities	30	0	0.3	$84,520
Construction	601	(60)	0.4	$49,667
Construction of Buildings	166	(8)	0.5	$57,527
Heavy and Civil Engineering Construction	110	17	0.7	$59,031
Specialty Trade Contractors	325	(69)	0.4	$42,485
Manufacturing	260	(169)	0.1	$36,921
Food Manufacturing	30	(14)	0.1	$14,657
Printing and Related Support Activities	22	(89)	0.3	$24,550
Nonmetallic Mineral Product Manufacturing	40	(3)	0.6	$34,512
Fabricated Metal Product Manufacturing	23	1	0.1	$62,113
Machinery Manufacturing	63	(32)	0.3	$43,337
Computer and Electronic Product Manufacturing	24	(2)	0.1	$37,701
Miscellaneous Manufacturing	51	11	0.5	$37,676
Wholesale trade	391	(156)	0.4	$51,867
Merchant Wholesalers, Durable Goods	256	(44)	0.5	$47,090
Merchant Wholesalers, Nondurable Goods	105	(113)	0.3	$57,710
Electronic Markets and Agents and Brokers	29	0	0.2	$72,564
Retail Trade	3,727	(73)	1.4	$24,563
Motor Vehicle and Parts Dealers	293	65	0.9	$41,194
Furniture and Home Furnishings Stores	108	(37)	1.3	$26,264
Electronics and Appliance Stores	232	(41)	2.7	$30,158
Building Material and Garden Supply Stores	334	5	1.6	$28,804

Food and Beverage Stores	700	(5)	1.4	$26,176
Health and Personal Care Stores	125	(15)	0.7	$32,887
Gasoline Stations	219	15	1.5	$18,581
Clothing and Clothing Accessories Stores	264	(44)	1.1	$19,546
Sporting Goods, Hobby, Book and Music Stores	280	(42)	2.6	$16,588
General Merchandise Stores	769	(35)	1.5	$20,556
Miscellaneous Store Retailers	357	56	2.3	$17,572
Nonstore Retailers	45	4	0.4	$35,611
Transportation and Warehousing	128	(22)	0.2	$35,179
Rail Transportation	11	1	0.3	$64,417
Truck Transportation	31	3	0.1	$22,853
Transit and Ground Passenger Transportation	28	15	0.3	$15,845
Support Activities for Transportation	26	(9)	0.2	$36,847
Warehousing and Storage	27	(36)	0.2	$55,565
Information	519	(56)	1.1	$52,302
Publishing Industries (except Internet)	322	(25)	2.6	$40,108
Motion Picture and Sound Recording Industries	18	(2)	0.2	$19,624
Telecommunications	54	(19)	0.4	$73,295
Data Processing, Hosting, and Related Services	43	(27)	0.9	$79,406
Other Information Services	81	16	2.0	$80,351
Finance and Insurance	734	3	0.7	$73,222
Credit Intermediation and Related Activities	468	18	1.1	$54,718
Securities, Commodity Contracts, and Other Financial Investments and Related Activities	118	54	0.7	$183,788
Insurance Carriers and Related Activities	148	(67)	0.3	$44,014
Real Estate and Rental and Leasing	494	55	1.2	$45,744
Real Estate	407	46	1.2	$47,883
Rental and Leasing Services	87	9	0.9	$35,706
Professional and Technical Services*	976	(166)	0.6	$56,394
Management of Companies and Enterprises*	652	(25)	1.8	$65,159

Administrative and Waste Services	582	(79)	0.4	$25,826
Administrative and Support Services	537	(113)	0.3	$25,137
Waste Management and Remediation Services	45	34	0.7	$34,124
Educational Services	349	93	0.5	$29,173
Health Care and Social Assistance	6,412	(260)	2.0	$54,963
Ambulatory Health Care Services	2,998	158	2.5	$66,943
Hospitals	2,755	(89)	3.5	$49,358
Nursing and Residential Care Facilities	33	(71)	0.1	$37,169
Social Assistance	625	(258)	1.0	$23,185
Arts, Entertainment, and Recreation	313	(40)	0.7	$19,074
Performing Arts, Spectator Sports, and Related Industries	48	12	0.4	$28,107
Museums, Historical Sites, and Similar Institutions	97	(3)	3.9	$19,715
Amusement, Gambling, and Recreation Industries	168	(49)	0.6	$16,108
Accommodation and Food Services	4,198	(21)	1.9	$16,495
Accommodation	435	(28)	1.4	$20,425
Food Services and Drinking Places	3,763	8	2.0	$16,041
Other Services, except Public Administration	997	(146)	0.8	$24,752
Repair and Maintenance	233	(36)	0.8	$36,323
Personal and Laundry Services	371	(72)	1.1	$21,423
Membership Associations and Organizations	309	(29)	0.7	$23,459
Private households	85	(9)	0.6	$12,275
Government	4,334	194	1.1	$40,699
Federal Government	721	1	0.9	$49,216
State Government	1,584	87	1.8	$38,160
Local Government	2,029	107	0.9	$39,653
Total	**25,698**	**(928)**		**$35,186**

Source: EMSI Q2 2015 Data Set, Garner Economics

Appendix E: 2015 Fredericksburg Area Occupational Details: Leading Occupational Categories

Highly specialized occupations (location quotient greater than 1.20) and high relative earnings (above $20.35, the national average hourly wage) are highlighted.

Occupation	2015 Jobs	Five-Year Change	LQ	Median Hourly Earnings
Management Occupations	1189	(32)	0.87	$52.22
Chief Executives	44	(2)	0.9	$85.37
General and Operations Managers	313	(17)	0.9	$58.08
Marketing Managers	24	(1)	0.7	$64.79
Sales Managers	37	(3)	0.6	$60.55
Public Relations and Fundraising Managers	13	0	1.3	$62.11
Administrative Services Managers	31	0	0.7	$43.73
Computer and Information Systems Managers	64	(7)	1.1	$65.72
Financial Managers	98	1	1.1	$59.91
Purchasing Managers	18	(1)	1.5	$56.86
Human Resources Managers	26	0	1.2	$59.74
Construction Managers	28	(2)	0.4	$36.05
Education Administrators, Elementary and Secondary School	23	5	0.6	$45.17
Education Administrators, Postsecondary	36	7	1.7	$40.42
Architectural and Engineering Managers	13	(1)	0.4	$61.74
Food Service Managers	65	(3)	1.4	$24.43
Lodging Managers	18	(1)	2.7	$32.64
Medical and Health Services Managers	97	1	1.8	$45.40
Property, Real Estate, and Community Association Managers	33	1	0.8	$32.08
Social and Community Service Managers	16	(4)	0.7	$34.61
Managers, All Other	133	(4)	1.2	$50.12

Occupation	2015 Jobs	Five-Year Change	LQ	Median Hourly Earnings
Business and Financial Operations Occupations	1280	(11)	1.01	$36.05
Wholesale and Retail Buyers, Except Farm Products	17	(1)	0.8	$25.92
Purchasing Agents, Except Wholesale, Retail, and Farm Products	48	(2)	1.0	$37.79
Compliance Officers	31	(2)	0.7	$35.38
Cost Estimators	28	(2)	0.7	$31.09
Human Resources Specialists	104	(10)	1.3	$35.54
Logisticians	14	0	0.6	$40.73
Management Analysts	179	5	1.4	$41.54
Meeting, Convention, and Event Planners	29	3	1.8	$27.23
Fundraisers	16	0	1.2	$31.65
Compensation, Benefits, and Job Analysis Specialists	13	0	0.9	$31.74
Training and Development Specialists	53	(10)	1.3	$32.43
Market Research Analysts and Marketing Specialists	79	2	0.9	$30.82
Business Operations Specialists, All Other	153	(1)	0.9	$39.07
Accountants and Auditors	245	(7)	1.1	$35.43
Budget Analysts	23	0	2.4	$40.13
Credit Analysts	15	1	1.3	$35.30
Financial Analysts	72	4	1.6	$39.66
Personal Financial Advisors	32	8	0.8	$36.97
Loan Officers	55	5	1.1	$31.94
Financial Specialists, All Other	24	0	1.0	$38.28
Computer and Mathematical Occupations	714	(110)	1.03	$42.06
Computer Systems Analysts	102	(17)	1.1	$44.42
Information Security Analysts	49	(2)	3.5	$46.25
Computer Programmers	20	(10)	0.4	$39.63
Software Developers, Applications	108	(25)	0.9	$47.66

Occupation	2015 Jobs	Five-Year Change	LQ	Median Hourly Earnings
Software Developers, Systems Software	61	(22)	0.9	$47.74
Web Developers	21	(2)	0.8	$36.36
Database Administrators	27	(2)	1.4	$43.97
Network and Computer Systems Administrators	98	(9)	1.6	$41.54
Computer Network Architects	34	(7)	1.4	$50.42
Computer User Support Specialists	87	(9)	0.8	$24.55
Computer Network Support Specialists	33	(5)	1.0	$32.41
Computer Occupations, All Other	33	(3)	0.9	$46.83
Operations Research Analysts	31	2	2.0	$46.09
Architecture and Engineering Occupations	177	(9)	0.41	$39.83
Architects, Except Landscape and Naval	14	(1)	0.7	$34.05
Civil Engineers	23	0	0.5	$37.88
Electrical Engineers	14	0	0.5	$44.98
Mechanical Engineers	16	0	0.3	$44.83
Electrical and Electronics Engineering Technicians	11	(1)	0.5	$31.36
Life, Physical, and Social Science Occupations	157	6	0.75	$38.02
Medical Scientists, Except Epidemiologists	17	1	1.0	$42.13
Environmental Scientists and Specialists, Including Health	10	(1)	0.7	$43.66
Clinical, Counseling, and School Psychologists	24	(1)	0.9	$35.55
Social Scientists and Related Workers, All Other	14	2	2.4	$44.15
Forensic Science Technicians	11	0	4.5	$32.23
Community and Social Service Occupations	499	(75)	1.2	$22.78
Substance Abuse and Behavioral Disorder Counselors	19	(5)	1.2	$24.37
Educational, Guidance, School, and Vocational Counselors	44	1	1.1	$27.60
Marriage and Family Therapists	26	(2)	4.0	$23.85
Mental Health Counselors	88	(14)	3.9	$20.80

Occupation	2015 Jobs	Five-Year Change	LQ	Median Hourly Earnings
Rehabilitation Counselors	29	(19)	1.4	$16.45
Child, Family, and School Social Workers	73	(5)	1.4	$24.72
Healthcare Social Workers	35	(1)	1.3	$26.61
Mental Health and Substance Abuse Social Workers	27	(6)	1.3	$23.98
Health Educators	13	0	1.3	$33.57
Probation Officers and Correctional Treatment Specialists	22	(6)	1.5	$23.64
Social and Human Service Assistants	41	(11)	0.6	$15.79
Community and Social Service Specialists, All Other	10	(2)	0.6	Insf. Data
Clergy	37	(2)	0.9	$20.80
Directors, Religious Activities and Education	19	(1)	0.9	$25.51
Legal Occupations	255	(16)	1.19	$51.64
Lawyers	134	(8)	1.0	$65.69
Paralegals and Legal Assistants	51	0	1.1	$29.46
Legal Support Workers, All Other	58	(4)	6.6	$42.51
Education, Training, and Library Occupations	1323	183	0.91	$24.85
Postsecondary Teachers	404	81	1.6	$29.95
Preschool Teachers, Except Special Education	79	(3)	1.1	$14.75
Kindergarten Teachers, Except Special Education	16	4	0.6	$28.22
Elementary School Teachers, Except Special Education	131	25	0.6	$29.28
Middle School Teachers, Except Special and Career/Technical Education	55	10	0.5	$29.38
Secondary School Teachers, Except Special and Career/Technical Education	82	16	0.5	$29.71
Special Education Teachers, Kindergarten and Elementary School	20	2	0.6	$28.55
Special Education Teachers, All Other	13	1	1.9	$35.39
Adult Basic and Secondary Education and Literacy Teachers and Instructors	15	1	1.2	$26.77
Self-Enrichment Education Teachers	62	(1)	1.0	$20.11
Substitute Teachers	99	12	1.0	$14.18

Occupation	2015 Jobs	Five-Year Change	LQ	Median Hourly Earnings
Teachers and Instructors, All Other	73	6	1.3	$24.92
Librarians	31	3	1.4	$33.06
Library Technicians	29	3	1.4	$18.80
Instructional Coordinators	23	2	1.0	$31.95
Teacher Assistants	144	17	0.7	$12.70
Education, Training, and Library Workers, All Other	10	Insf. Data	0.6	Insf. Data
Arts, Design, Entertainment, Sports, and Media Occupations	405	(10)	0.91	$24.88
Floral Designers	15	0	1.6	$12.20
Graphic Designers	47	(6)	1.0	$25.98
Merchandise Displayers and Window Trimmers	10	(2)	0.6	$13.21
Coaches and Scouts	55	5	1.4	$17.40
Musicians and Singers	20	0	0.6	$19.94
Reporters and Correspondents	16	(2)	2.0	$27.90
Public Relations Specialists	47	(1)	1.2	$35.54
Editors	56	(3)	2.7	$29.22
Writers and Authors	18	(1)	0.8	$28.45
Interpreters and Translators	20	2	1.7	$31.61
Photographers	16	(5)	0.8	$17.85
Healthcare Practitioners and Technical Occupations	3007	21	2.18	$38.17
Dentists, General	41	2	1.8	$58.71
Dietitians and Nutritionists	16	0	1.5	$27.06
Optometrists	20	2	2.9	$58.72
Pharmacists	71	(1)	1.4	$52.27
Family and General Practitioners	95	(1)	4.1	$84.77
Internists, General	24	(1)	2.7	$58.02
Obstetricians and Gynecologists	38	(1)	9.2	$91.04

Occupation	2015 Jobs	Five-Year Change	LQ	Median Hourly Earnings
Pediatricians, General	40	0	6.7	$64.09
Psychiatrists	14	(1)	3.0	$84.59
Surgeons	24	0	3.0	$90.48
Physicians and Surgeons, All Other	96	0	1.6	$85.11
Physician Assistants	43	3	2.7	$44.04
Occupational Therapists	37	2	1.9	$39.08
Physical Therapists	96	11	2.7	$36.38
Respiratory Therapists	55	(1)	2.7	$29.13
Speech-Language Pathologists	29	3	1.3	$36.67
Exercise Physiologists	11	0	5.9	$25.35
Veterinarians	17	(1)	1.4	$45.18
Registered Nurses	1,119	(3)	2.4	$33.19
Nurse Anesthetists	26	(1)	4.1	$75.73
Nurse Practitioners	65	3	3.1	$46.92
Medical and Clinical Laboratory Technologists	103	0	3.8	$28.63
Medical and Clinical Laboratory Technicians	97	5	3.6	$17.37
Dental Hygienists	49	6	1.4	$40.64
Cardiovascular Technologists and Technicians	37	1	4.3	$29.97
Diagnostic Medical Sonographers	50	5	4.9	$35.52
Radiologic Technologists	109	1	3.3	$29.93
Magnetic Resonance Imaging Technologists	22	0	3.9	$36.60
Emergency Medical Technicians and Paramedics	23	(2)	0.6	$20.21
Pharmacy Technicians	58	(3)	0.9	$14.24
Psychiatric Technicians	31	(11)	2.8	$15.69
Surgical Technologists	60	4	3.5	$24.19
Veterinary Technologists and Technicians	13	1	0.8	$17.25

Occupation	2015 Jobs	Five-Year Change	LQ	Median Hourly Earnings
Ophthalmic Medical Technicians	17	0	2.7	$20.63
Licensed Practical and Licensed Vocational Nurses	158	(6)	1.3	$23.62
Medical Records and Health Information Technicians	43	0	1.3	$20.48
Opticians, Dispensing	23	1	1.8	$21.34
Health Technologists and Technicians, All Other	31	2	1.8	$18.21
Athletic Trainers	10	Insf. Data	2.7	Insf. Data
Healthcare Practitioners and Technical Workers, All Other	15	0	2.1	$31.11
Healthcare Support Occupations	974	(12)	1.36	$15.31
Home Health Aides	87	(13)	0.6	$10.86
Nursing Assistants	288	(12)	1.2	$13.75
Orderlies	11	(1)	1.2	$12.81
Physical Therapist Assistants	34	5	2.6	$25.09
Physical Therapist Aides	27	4	3.2	$11.72
Massage Therapists	47	(1)	1.7	$18.41
Dental Assistants	112	12	2.1	$16.51
Medical Assistants	221	1	2.2	$16.45
Medical Equipment Preparers	24	1	2.7	$16.45
Medical Transcriptionists	19	(4)	1.5	$17.72
Veterinary Assistants and Laboratory Animal Caretakers	24	0	1.8	$12.97
Phlebotomists	47	2	2.5	$15.92
Healthcare Support Workers, All Other	16	0	0.9	$16.09
Protective Service Occupations	564	(11)	0.97	$23.94
First-Line Supervisors of Police and Detectives	23	0	1.3	$45.03
First-Line Supervisors of Fire Fighting and Prevention Workers	15	0	1.5	$38.15
First-Line Supervisors of Protective Service Workers, All Other	12	0	1.0	$21.86
Firefighters	87	3	1.6	$24.58

Occupation	2015 Jobs	Five-Year Change	LQ	Median Hourly Earnings
Correctional Officers and Jailers	40	(10)	0.5	$23.97
Detectives and Criminal Investigators	14	(1)	0.7	$52.86
Police and Sheriff's Patrol Officers	158	2	1.4	$28.60
Security Guards	127	(1)	0.7	$15.41
Crossing Guards	11	0	1.0	$14.20
Lifeguards, Ski Patrol, and Other Recreational Protective Service Workers	38	(3)	1.6	$8.67
Protective Service Workers, All Other	12	0	0.6	$15.53
Food Preparation and Serving Related Occupations	3802	(14)	1.80	$10.02
Chefs and Head Cooks	37	(2)	1.7	$24.00
First-Line Supervisors of Food Preparation and Serving Workers	281	11	1.9	$15.66
Cooks, Fast Food	83	(1)	0.9	$8.62
Cooks, Institution and Cafeteria	36	(2)	0.5	$13.42
Cooks, Restaurant	476	(9)	2.5	$11.41
Cooks, Short Order	12	(2)	0.4	$10.60
Cooks, All Other	13	(1)	3.2	$11.34
Food Preparation Workers	222	(3)	1.5	$9.47
Bartenders	132	(4)	1.4	$11.99
Combined Food Preparation and Serving Workers, Including Fast Food	951	81	1.8	$8.50
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	111	1	1.4	$8.69
Waiters and Waitresses	901	(56)	2.2	$8.97
Food Servers, Nonrestaurant	61	(2)	1.4	$11.95
Dining Room and Cafeteria Attendants and Bartender Helpers	153	(7)	2.2	$8.70
Dishwashers	164	(9)	1.9	$9.10
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	160	(10)	2.5	$9.02
Building and Grounds Cleaning and Maintenance Occupations	657	(15)	0.67	$12.39
First-Line Supervisors of Housekeeping and Janitorial Workers	33	(1)	1.0	$18.89

Occupation	2015 Jobs	Five-Year Change	LQ	Median Hourly Earnings
First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers	11	0	0.5	$19.46
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	251	(9)	0.6	$12.91
Maids and Housekeeping Cleaners	246	(13)	1.0	$10.78
Landscaping and Groundskeeping Workers	109	7	0.5	$11.92
Personal Care and Service Occupations	962	(184)	0.95	$11.53
First-Line Supervisors of Personal Service Workers	38	(7)	1.1	$17.19
Nonfarm Animal Caretakers	39	(3)	1.0	$10.04
Ushers, Lobby Attendants, and Ticket Takers	11	Insf. Data	0.6	$8.54
Amusement and Recreation Attendants	39	(2)	0.8	$8.68
Hairdressers, Hairstylists, and Cosmetologists	150	(20)	1.4	$12.94
Manicurists and Pedicurists	29	(3)	1.4	$9.51
Shampooers	20	(4)	4.6	$8.64
Skincare Specialists	14	1	1.4	$23.36
Baggage Porters and Bellhops	15	0	2.1	$9.74
Concierges	25	1	4.7	$14.11
Tour Guides and Escorts	13	(1)	1.8	$12.69
Childcare Workers	147	(16)	0.7	$8.66
Personal Care Aides	255	(98)	0.9	$9.89
Fitness Trainers and Aerobics Instructors	44	(19)	1.0	$20.26
Recreation Workers	70	(1)	1.1	$12.39
Residential Advisors	15	(6)	0.8	$12.35
Personal Care and Service Workers, All Other	11	(1)	0.7	$11.49
Sales and Related Occupations	3150	(199)	1.19	$13.83
First-Line Supervisors of Retail Sales Workers	317	(11)	1.3	$19.19
First-Line Supervisors of Non-Retail Sales Workers	43	(4)	0.7	$35.89
Cashiers	885	(11)	1.5	$9.19

Occupation	2015 Jobs	Five-Year Change	LQ	Median Hourly Earnings
Counter and Rental Clerks	78	(2)	1.0	$12.89
Parts Salespersons	38	2	0.9	$13.98
Retail Salespersons	1,230	(64)	1.6	$9.53
Advertising Sales Agents	28	(2)	0.9	$24.34
Insurance Sales Agents	35	(65)	0.3	$21.72
Securities, Commodities, and Financial Services Sales Agents	48	11	0.8	$36.04
Sales Representatives, Services, All Other	121	(19)	0.8	$28.10
Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	22	(4)	0.4	$42.37
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	131	(34)	0.5	$27.16
Demonstrators and Product Promoters	13	(2)	0.8	$11.00
Real Estate Brokers	24	3	1.5	$27.21
Real Estate Sales Agents	104	10	1.4	$21.13
Telemarketers	10	(3)	0.2	$9.42
Office and Administrative Support Occupations	3789	(189)	0.97	$17.60
First-Line Supervisors of Office and Administrative Support Workers	304	(8)	1.2	$26.91
Switchboard Operators, Including Answering Service	19	(2)	1.0	$13.81
Bill and Account Collectors	45	(18)	0.8	$19.21
Billing and Posting Clerks	124	0	1.4	$18.88
Bookkeeping, Accounting, and Auditing Clerks	251	(7)	0.8	$19.96
Payroll and Timekeeping Clerks	18	(1)	0.6	$22.35
Tellers	102	(4)	1.2	$13.64
Court, Municipal, and License Clerks	14	(1)	0.6	$17.91
Customer Service Representatives	247	(20)	0.6	$16.66
Eligibility Interviewers, Government Programs	11	(2)	0.5	$23.25
File Clerks	26	(3)	1.0	$15.19

Occupation	2015 Jobs	Five-Year Change	LQ	Median Hourly Earnings
Hotel, Motel, and Resort Desk Clerks	59	0	1.5	$11.46
Interviewers, Except Eligibility and Loan	41	(2)	1.1	$15.82
Library Assistants, Clerical	22	3	1.0	$13.81
Loan Interviewers and Clerks	41	3	1.2	$18.95
Order Clerks	18	(3)	0.6	$14.12
Human Resources Assistants, Except Payroll and Timekeeping	24	(2)	1.0	$20.01
Receptionists and Information Clerks	395	(7)	2.3	$14.61
Information and Record Clerks, All Other	22	(1)	0.7	$22.99
Couriers and Messengers	20	(1)	1.2	$14.53
Police, Fire, and Ambulance Dispatchers	20	0	1.2	$20.58
Dispatchers, Except Police, Fire, and Ambulance	16	0	0.5	$17.38
Postal Service Clerks	15	(2)	1.3	$27.09
Postal Service Mail Carriers	50	(7)	1.0	$27.41
Postal Service Mail Sorters, Processors, and Processing Machine Operators	22	(3)	1.1	$26.38
Production, Planning, and Expediting Clerks	35	(4)	0.7	$22.81
Shipping, Receiving, and Traffic Clerks	59	(12)	0.5	$15.22
Stock Clerks and Order Fillers	406	(31)	1.3	$10.97
Executive Secretaries and Executive Administrative Assistants	143	(7)	1.1	$27.05
Legal Secretaries	26	(3)	0.7	$29.13
Medical Secretaries	102	3	1.1	$17.17
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	280	(4)	0.6	$18.53
Data Entry Keyers	27	(6)	0.7	$15.42
Insurance Claims and Policy Processing Clerks	20	(2)	0.5	$16.85
Mail Clerks and Mail Machine Operators, Except Postal Service	29	(11)	1.7	$15.35
Office Clerks, General	602	(20)	1.1	$15.16
Office Machine Operators, Except Computer	10	(8)	0.9	$14.19

Occupation	2015 Jobs	Five-Year Change	LQ	Median Hourly Earnings
Office and Administrative Support Workers, All Other	55	4	1.0	$17.07
Construction and Extraction Occupations	546	(39)	0.47	$20.23
First-Line Supervisors of Construction Trades and Extraction Workers	69	(1)	0.6	$28.78
Carpenters	76	(14)	0.4	$19.11
Construction Laborers	89	(3)	0.4	$14.65
Operating Engineers and Other Construction Equipment Operators	30	0	0.5	$19.84
Drywall and Ceiling Tile Installers	18	(8)	0.9	$17.15
Electricians	31	(2)	0.3	$23.58
Painters, Construction and Maintenance	29	0	0.4	$16.61
Plumbers, Pipefitters, and Steamfitters	43	6	0.6	$25.16
Construction and Building Inspectors	19	0	1.2	$28.23
Highway Maintenance Workers	28	(2)	1.1	$18.06
Installation, Maintenance, and Repair Occupations	609	(4)	0.62	$21.38
First-Line Supervisors of Mechanics, Installers, and Repairers	53	(1)	0.7	$31.95
Computer, Automated Teller, and Office Machine Repairers	16	(8)	0.7	$18.49
Automotive Body and Related Repairers	12	(3)	0.4	$24.06
Automotive Service Technicians and Mechanics	129	12	1.0	$20.85
Bus and Truck Mechanics and Diesel Engine Specialists	16	(1)	0.4	$21.75
Tire Repairers and Changers	29	1	1.6	$12.06
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	43	4	0.8	$25.72
Telecommunications Line Installers and Repairers	16	2	0.8	$29.04
Maintenance and Repair Workers, General	182	1	0.8	$18.80
Helpers--Installation, Maintenance, and Repair Workers	18	1	0.8	$13.30
Production Occupations	410	(134)	0.26	$16.80
First-Line Supervisors of Production and Operating Workers	31	(8)	0.3	$27.76
Team Assemblers	17	(8)	0.1	$11.12

Occupation	2015 Jobs	Five-Year Change	LQ	Median Hourly Earnings
Assemblers and Fabricators, All Other	24	(7)	0.6	$13.84
Bakers	27	(3)	0.9	$13.12
Butchers and Meat Cutters	18	(1)	0.8	$17.38
Welders, Cutters, Solderers, and Brazers	14	(3)	0.2	$20.39
Printing Press Operators	30	(27)	1.1	$20.56
Laundry and Dry-Cleaning Workers	30	(4)	0.8	$11.37
Water and Wastewater Treatment Plant and System Operators	19	1	1.0	$21.85
Inspectors, Testers, Sorters, Samplers, and Weighers	18	(3)	0.2	$15.22
Dental Laboratory Technicians	10	Insf. Data	1.6	Insf. Data
Ophthalmic Laboratory Technicians	12	0	2.4	$17.16
Helpers--Production Workers	18	(8)	0.2	$10.88
Production Workers, All Other	12	(4)	0.3	$13.87
Transportation and Material Moving Occupations	809	(83)	0.49	$13.81
First-Line Supervisors of Helpers, Laborers, and Material Movers, Hand	12	(2)	0.4	$21.87
First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	21	(3)	0.6	$27.60
Bus Drivers, Transit and Intercity	22	1	0.8	$17.00
Bus Drivers, School or Special Client	69	4	0.8	$15.69
Driver/Sales Workers	94	(13)	1.3	$11.13
Heavy and Tractor-Trailer Truck Drivers	85	(16)	0.3	$17.26
Light Truck or Delivery Services Drivers	106	(10)	0.7	$15.35
Taxi Drivers and Chauffeurs	27	5	0.6	$10.48
Parking Lot Attendants	13	(2)	0.5	$9.27
Automotive and Watercraft Service Attendants	16	2	0.9	$10.39
Industrial Truck and Tractor Operators	29	(12)	0.3	$15.69
Cleaners of Vehicles and Equipment	55	11	0.9	$8.99

Occupation	2015 Jobs	Five-Year Change	LQ	Median Hourly Earnings
Laborers and Freight, Stock, and Material Movers, Hand	162	(29)	0.4	$10.41
Packers and Packagers, Hand	46	(13)	0.4	$8.46
Refuse and Recyclable Material Collectors	15	0	0.7	$15.19
Military Occupations	412	8	1.2	$14.74
Military Occupations	412	8	1.23	$14.74
Total	25,698	(928)		$22.43

Source: EMSI Q2 2015 Data Set, Garner Economics

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Embracing History and Progress: Creating an Economic Development Master Plan for Fredericksburg, Virginia

Prepared for:
The City of Fredericksburg, Office of Economic Development and Tourism

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EXECUTIVE SUMMARY

In August 2015, the City of Fredericksburg, Virginia's, Department of Economic Development and Tourism (EDT) retained Garner Economics, LLC to develop an Economic Development Master Plan (strategy) that takes into account the current state of the City and provides a roadmap for Fredericksburg to create economic opportunities for its citizens.

The process to build ***Embracing History and Progress: Creating an Economic Development Master Plan for Fredericksburg, Virginia*** was three-fold: Analysis and Assessment, Identifying Target Industries, and Recommendations. Together, the three phases provide:

(1) A comprehensive and holistic assessment of key forces driving the economy and its shifting dynamics;

(2) An **ASSETS AND CHALLENGES ASSESSMENT** (A&C) of Fredericksburg from the perspective of a site-location consultant who facilitates investment decisions;

(3) Recommendations for business targets suitable for the City based on our research and analysis; and finally,

(4) A set of implementable recommendations that the leadership in the City can utilize to enhance the economic well-being of the area and make Fredericksburg a desirable business location and enhance its quality of place.

The end result, ***Embracing History and Progress***, is a master plan that will help Fredericksburg strengthen the area's business climate, assist the area in increasing its economic competitiveness, and differentiate the community from peers in the Washington metro area.

Analysis and Assessments

As summarized in the **COMPETITIVE REALITIES REPORT** shared with the City in December 2015, our approach to creating the ***Embracing History and Progress*** master plan began with Garner Economics conducting an A&C of the City and region and gathering input and perceptions of Fredericksburg's business climate from the community. The former was done through a windshield tour of the area and against a pre-determined list of 47 criteria used to evaluate Fredericksburg from a site-selection perspective. Garner Economics assessed the area based on the qualities, elements, and infrastructure that a business will look for when considering Fredericksburg as a place for its operations.

The community engagement phase took the form of four focus groups with key community stakeholders and an online survey to solicit a variety of perceptions of the area's business climate and areas for improvement. This input was used to validate or augment conclusions reached in the A&C.

Finally, because Fredericksburg must compete with other localities, it is important to understand where the area stands compared to key competitors. Garner Economics evaluated key demographic and economic indicators for the City and compared them to statewide and national-level data, as well against four benchmark cities in Virginia: Charlottesville, Manassas, Winchester, and Staunton. (These benchmarks were selected by the staff of the Department of Economic Development and Tourism.) In addition to these assessments, the team also looked at Fredericksburg's retail sector and identified areas of leakage and conducted a Local Specialization, Competitiveness & Growth Assessment for the City.

These "building blocks" that were presented in the **COMPETITIVE REALITIES REPORT** are summarized in Chapter 1 and also are the basis upon which the recommendations were built.

Target Industries

The analysis above revealed that Fredericksburg has many assets upon which to build. However, the City must find a balance between proactively welcoming investments to the community, while still protecting the fabric that makes Fredericksburg what it is today. To do so, the City must find consensus around the type of community it wants to be and work to recruit and retain the types of companies and talent that will enable this vision to come to fruition.

Chapter 2 provides insights into what types of targets are "best fits" for Fredericksburg, given the City's existing assets and goals for the future. The description of, and rationale for, the targets will help the Department of Economic Development and Tourism and other economic development groups in the City prioritize marketing resources and will identify areas where policymakers can act to increase Fredericksburg's competitive position in attracting and retaining these business sectors.

The identified target industry sectors for Fredericksburg are:

- **Tourism, Hospitality, and Specialty Retail**
- **Science and Technology, R&D, Contracting, and Consulting**
- **Professional and Corporate Office Users**
- **Education and Health Services**

Recommendations

While Fredericksburg has several attributes upon which it can build to attract the target industries, the City must confront the challenges that are impeding it from being a competitive place for business and talent to locate. The recommendations suggested in Chapter 3 reflect items the team believes the City should undertake to mitigate negative perceptions by site-location advisors or companies looking to invest in Fredericksburg. It also indicates areas where Fredericksburg should work with others in the region to strengthen the City's business climate and improve its economic development service delivery to support this transition and growth. Additionally, the recommendations provide tactics the Department of Economic Development and Tourism can use to effectively market Fredericksburg to the recommended industry targets.

The recommendations go beyond traditional recruitment, expansion, and retention activities and look at Fredericksburg and its economic future holistically. The recommendations are meant to be a comprehensive economic development strategy and are built to support one another. To be successful in attaining its goals, City leaders will need to take on a more structured approach to economic development that is proactive in guiding the City's growth. This will mean executing economic development efforts differently and being a champion for long-term investments that will add to the City's product and quality of place.

The recommendations are explained in detail in Chapter 3 (pages 41-59) and are broken into three categories: policy changes and investments that should be made to strengthen the City's "product," tactics to market the City and better tell its economic development story, and organizational changes that will allow Fredericksburg to accomplish these goals. The recommendations detailed in Chapter 3 further provide the optimal sequencing for taking on the tasks.

As described in the following chapters, Fredericksburg is well positioned to chart a strong economic future. However, given the competition of its peer communities and changing demands and needs of the City's talented workforce, Fredericksburg must be strategic in strengthening its assets and differentiating factors. Fortunately, the City has the leadership, aspirations, and resources to catalyze change in the community. By taking steps to change its trajectory, Fredericksburg can shape its economic future and optimize economic opportunities for its residents.

The following chapters provide the rationale and create a plan for ***Embracing History and Progress***. Achieving these goals will require bold and strategic steps to transform Fredericksburg into a place that attracts quality talent and companies, while maintaining the City's unique character and commitment to quality and fully leveraging its position in the region.

Figure 1 provides a summary of the recommendations offered in ***Embracing History and Progress***. Chapter 3 provides a more detailed discussion on the observations made and rationale for their inclusion in this master plan.

Figure 1: Master Plan Recommendations

Product Improvement	Product Marketing	Organizational Enhancements
Goal: Fredericksburg strengthens its quality of place and talent pipeline that attract and retain the region's most talented people and companies.	**Goal:** The City is better able to attract the types of companies that will leverage the City's many assets and increase the quantity and quality of economic opportunities for its citizens.	**Goal:** The City is better able to attract the types of industries and talent that will make Fredericksburg even more competitive.
1. Create a Tourism Product Development Fund. 2. Review the Jump Start Action Plan of 2006, inventory successes, and update those items for implementation that are relevant for Fredericksburg today. 3. Create a Culinary Institute at Germanna Community College. 4. Provide the public free, high-speed Internet access to enhance the visitor and resident experience in the Core Business District and in disadvantaged neighborhoods where access is limited based on affordability. 5. Placemaking: create a plan to improve gateways into the City—including new signage and landscaping. 6. Work to attract an upscale, boutique hotel Downtown based on the successful validation of a market analysis. 7. Create a broad and actionable river master plan, and create venues as part of a river development strategy. 8. Update the Desman Parking Study of 2006.	1. Rebrand (or create) a City of Fredericksburg unified brand. Utilize consistent messaging across all media and printed materials. 2. Execute a process for lead generation and business target profiling. 3. Actively solicit and provide information to site-location consultants. 4. Develop familiarization (FAM) events for consultants and companies, with cooperation from the Fredericksburg Regional Alliance. 5. Enhance the City Economic Development website to address the needs of location consultants and potential investors.	1. Staff a City business investment and retention ombudsman in the City manager's office. 2. Create a one-stop permitting office to streamline the permit process and create an internal culture of "yes." 3. Move the EDT's management and business promotion offices to a more corporate environment. 4. Conduct a third-party, unbiased review of the Unified Development Ordinance (UDO). 5. Promote local entrepreneurship by helping small businesses and startup firms be more productive and innovative. 6. Keep tourism part of the organizational structure of the EDT. 7. Advocate for and develop a realistic and sustainable incentive policy for the City.

Chapter 1: Where Fredericksburg Stands as a Place for Business

A summary of the *Competitive Realities Report*

This chapter summarizes the Garner Economics team's findings in Phase I, the "discovery" phase of the assignment. The assessment was an objective and subjective evaluation and included data collection, on-site visits, and soliciting opinions and perspectives of the City's stakeholders. By knowing where Fredericksburg stands, the City knows what challenges or gaps exist and can take steps to ameliorate negative situations, strengthen its overall "product," and be a more attractive business location. Likewise, by knowing the area's strengths, the City can better market them in its efforts to attract external businesses and retain those businesses already located in Fredericksburg.

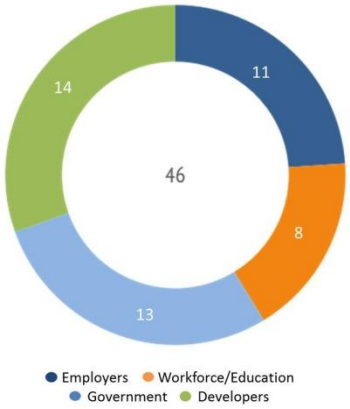
What Stakeholders Think

To provide a context around the data accumulated in Phase I, Garner Economics held four focus group sessions with stakeholders in Fredericksburg to solicit their perceptions and opinions of the area's business climate. Forty-six people participated in the focus groups. As indicated in Figure 2, the focus groups were organized into the following categories: Employers, Government, Workforce and Education, and Developers. The EDT and two City Council champions identified and invited participants based on their knowledge of issues impacting the City's business climate and its effect on companies and employers.

Additionally, an electronic survey based on the focus group responses was distributed. There were 469 people who responded to the survey. The respondents represented a broad group of area residents, including both corporate and economic development perspectives as well as feedback from the general citizenry.

Among the two groups, there were several areas of agreement. Survey respondents tended to focus on broader quality-of-place assets and issues, while focus group respondents had deeper comments and concerns over particular economic assets or challenges such as local regulations and procedures and workforce needs. The overarching key themes that emerged include:

Figure 2: Focus Group Participants



- A desire for more streamlined interaction with the City
- Pride in the historic and small-town aspects of the City and a desire to protect it
- A desire to attract more jobs and stem out-commuting patterns
- The need to improve traffic and accessibility along the I-95 road and rail corridor
- A desire for more, true regionalism
- Maximizing the use of the Rappahannock River
- A desire for an easier mechanism to deal with the City
- Optimism about Fredericksburg's future

The graphs on the following pages highlight the feedback in terms of the overall competitive position of the City. A detailed summary of the community engagement input was provided in the **Competitive Realities Report**.

FIGURE 3: PRIORITIES TO STRENGTHEN FREDERICKSBURG'S COMPETITIVE POSITION AS A PLACE FOR BUSINESSES AND TALENT

When asked to indicate the top items they would like to see the City leadership take on to strengthen Fredericksburg's ability to attract and retain quality companies and talent to the City—without worrying about money or politics—the two groups responded as follows:

Most frequently noted by focus groups:

- Attract more corporate employers to lessen out-commuting patterns
- Maximize the use of the Rappahannock River
- Improve traffic and accessibility along the I-95 road and rail corridor
- Build a strong Downtown and have appropriate development elsewhere
- Protect the historic and small-town character of the City
- Build true regional cooperation

Most frequently noted by survey respondents:

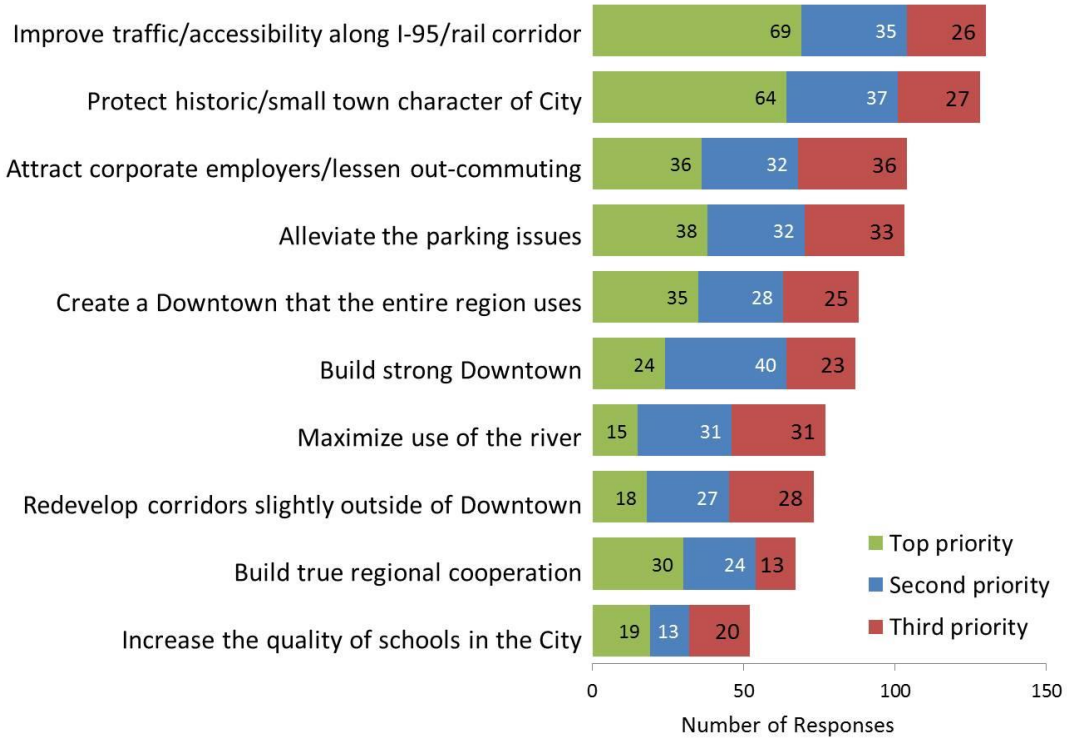
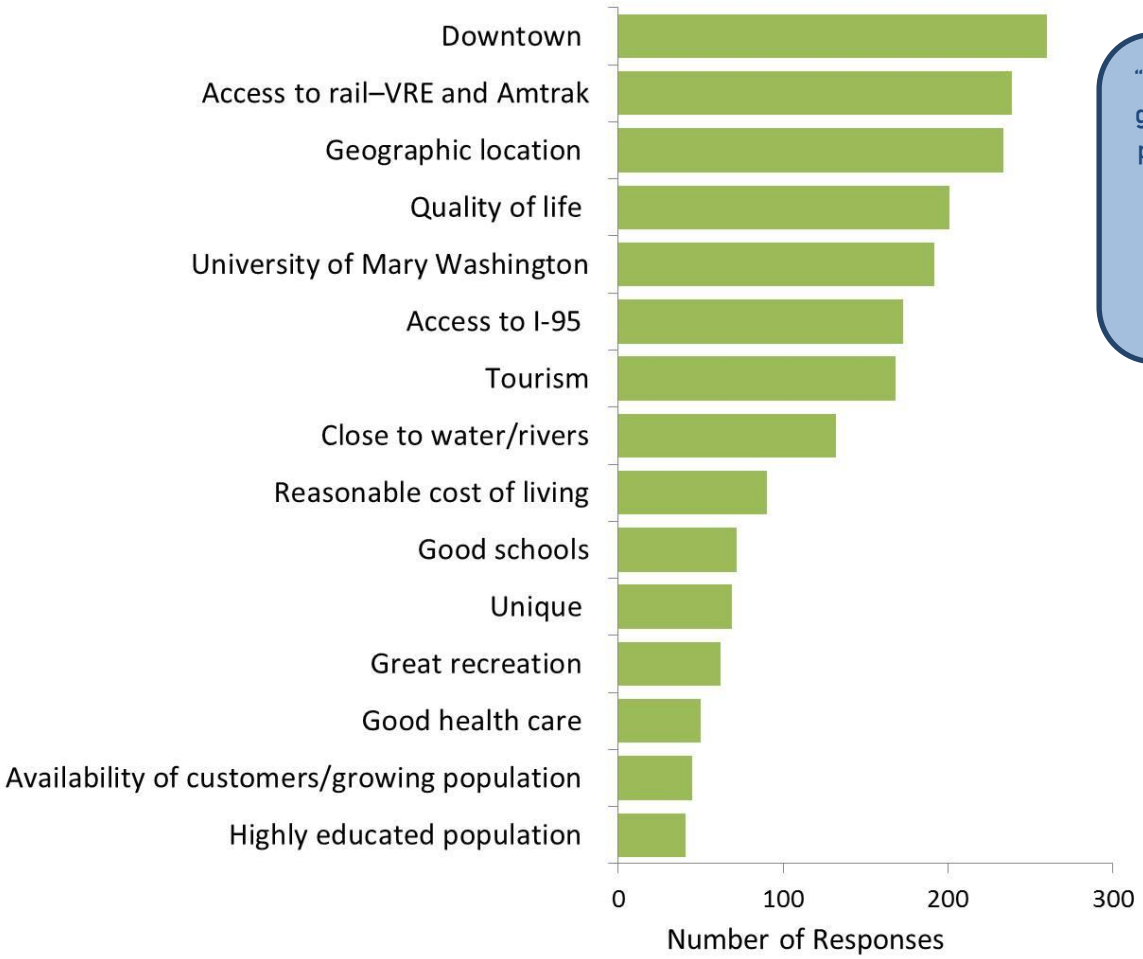


FIGURE 4: PERCEIVED STRENGTHS

When asked to indicate Fredericksburg's strengths, the two groups responded as follows:

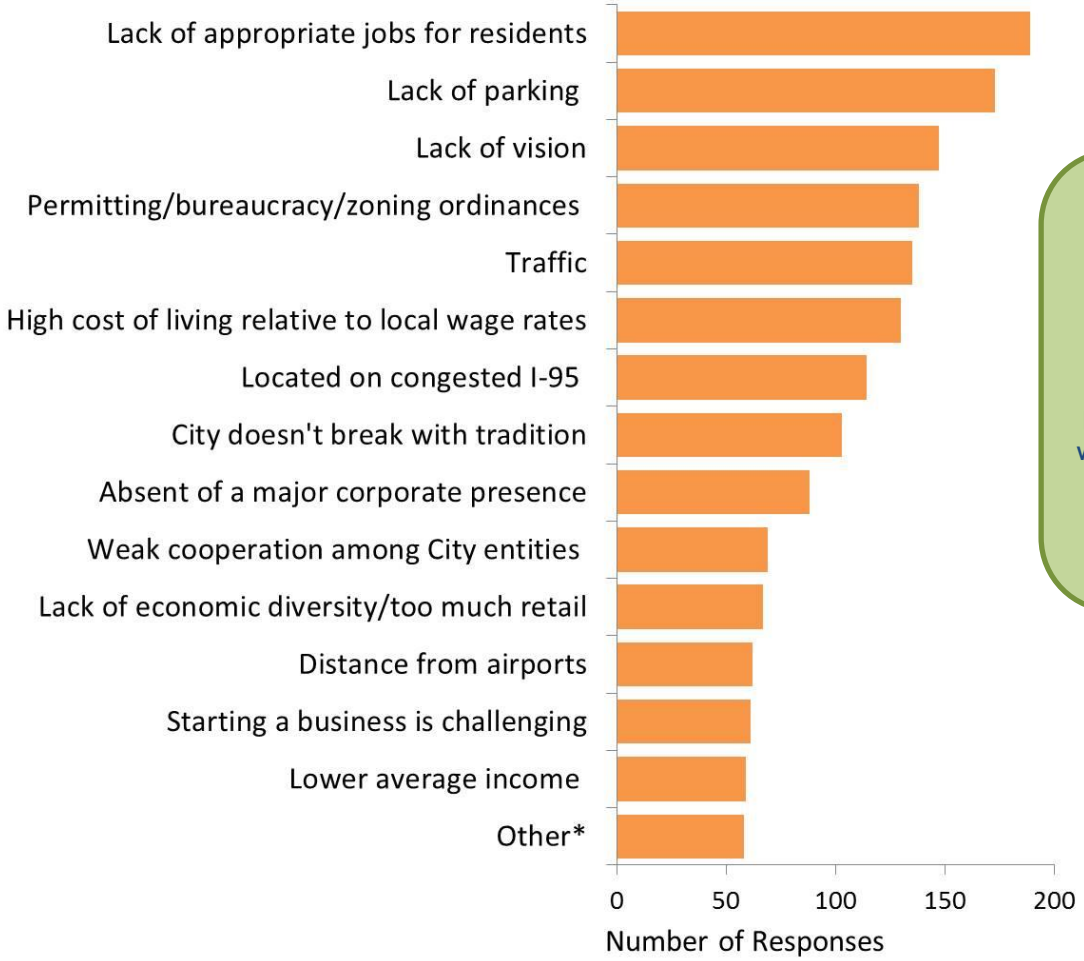


"Fredericksburg is capable of joining a group of elite small southern cities. Its proximity to D.C., university presence, and access to nature—to name but a few—provide a great platform for business development."

— Survey Respondent

FIGURE 5: PERCEIVED INHIBITORS

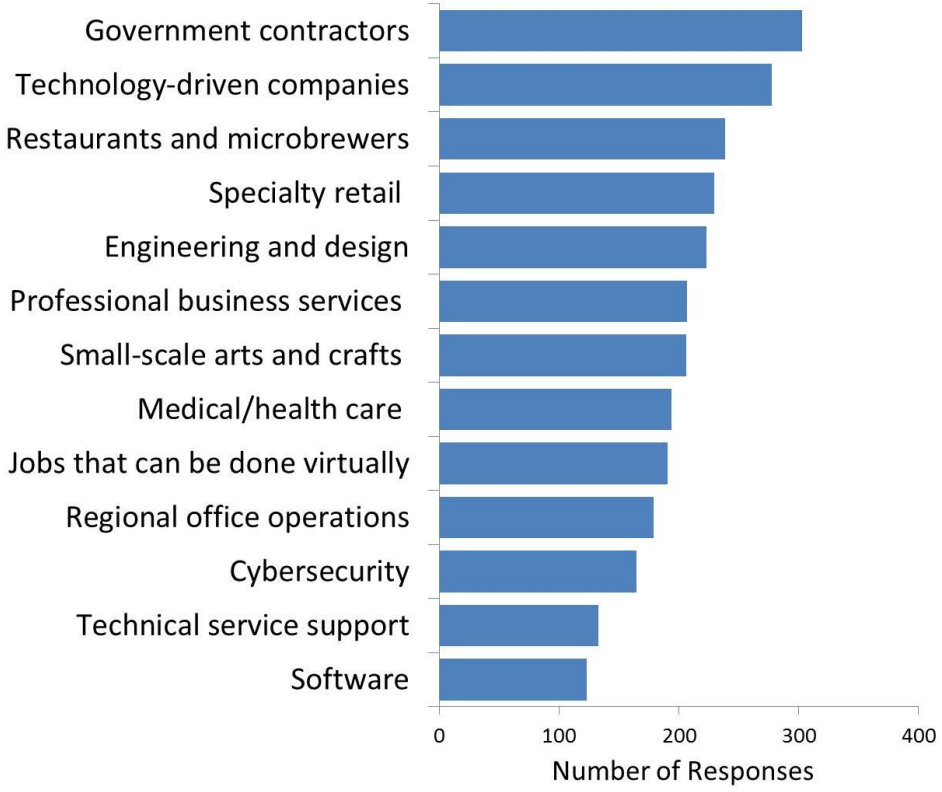
When asked to indicate issues that inhibit Fredericksburg from recruiting businesses, the two groups responded as follows:



"To be attractive for businesses to start, there needs to be more cohesiveness between all entities involved. A faster permitting process, perhaps have a 'one stop information person' who can tell you exactly what you need and with whom to speak regarding the necessary processes of starting their particular business."

Figure 6: Potential Industries

When asked what types of companies would be a good fit for the area, the two groups responded as follows:



"We need to increase the diversity of the regional demographics. Our communities around the region offer little to the 21-30 population. Housing isn't affordable, local jobs don't pay competitive wages (especially for college-educated millennials), and there is little to offer in entertainment/nightlife. A large focus of the strategic plan for the City should be creating a regional culture that is less hostile, more open to, and providing incentives for staying to younger people."

— Survey Respondent

FIGURE 7: LACKING INFRASTRUCTURE

When asked what hard or soft infrastructure* is weak or missing in Fredericksburg, the two groups responded as follows:

"Put more focus on areas such as the portions of Route 1 and Route 3 that are part of the City and serve as gateways into the City. Route 3 is a traffic nightmare, and the shopping centers are big concrete jungles that are outdated and unattractive. They make for a bad first impression of Fredericksburg when getting off of I-95."

— Focus Group Participant

*Hard infrastructure was defined as the physical networks such as roadways, sewer, broadband Internet, airports, and/or ports. Soft infrastructure was defined as institutions or places that support the economic, health, and cultural climate of a place, such as the education system, the health care system, system of government, and/or parks.

Assets and Challenges Assessment

Grounded by decades of economic development, site-location analysis, and industry cluster targeting experience, Garner Economics began the project to assess Fredericksburg by using a rigorous set of techniques based on fully sourced and reliable data sets to completely understand the City's current economic state and competitiveness as a business location. The main component of this phase was the **ASSETS AND CHALLENGES ASSESSMENT**, which is a compilation of local facts and data points with quantitative analysis and some subjective opinions. These are typically the same variables that are used when conducting a location assessment on behalf of a corporate client.

To enable a summary overview of the **ASSETS AND CHALLENGES ASSESSMENT'S** main findings for readers, a set of dashboard icons was presented. Each finding has an accompanying icon to assist with interpretation. Figure 10 and the tables on pages 15-19 summarize the assessment of the City.

REPORT DASHBOARD

- Indicates the City is better (more positive) compared to a majority of the benchmark geographies or points to a positive trend or asset within the area.
- Indicates the City is neutral or normal, neither positive nor negative. Indicator may represent an observation or be in the middle of the benchmark geographies.
- Indicates the City is worse compared to a majority of the benchmark geographies or points to a negative trend or challenge within the area.

What is Competitiveness?

An area's economic competitiveness depends on several factors. On a macro level, it includes not only the regulatory environment and infrastructure an area provides but also its talent base, available sites, and economic development service delivery. A favorable tax environment and the willingness to offer creative and unique incentive packages are important, as are low operating costs and reliable, affordable sites. Similarly, companies look for areas that offer relevant and scalable skilled labor along with low labor costs as much as they look for quality sites that are flexible and allow for future expansion with minimal development time. Finally, the ability of an area to provide economic development services—for example, clear, succinct, and focused marketing messages; organized and coordinated outreach; and high levels of client service—sets leading areas apart.

More specifically, according to an annual survey conducted by *Area Development Magazine,* the top business factors that companies rank as the most important in their site-selection process are noted in Figure 8. The survey consists of a cross-section of companies of diverse industry sectors and sizes. Figure 9 notes the top "Quality of Place" factors companies consider to be important when choosing a new location. Garner Economics assessed Fredericksburg and developed recommendations for this master plan with an understanding of what these potential investors, "the customer," deem critical in their decision-making process.

Figure 8: Business Factors

Ranking	2014	2013
1. Highway accessibility	88.3	93.5(2)**
2. Occupancy or construction costs	87.9	87.4 (4)
3. Available land	85.7	80.3 (13)
4. Available buildings	82.2	83.3 (6)
5. Availability of skilled labor	82.1	95.1 (1)
6. Labor costs	81.6	90.8 (3)
7. Right-to-work state	77.9	80.6 (11T)
8. Proximity to major markets	77.1	75.6 (15)
9. Energy availability and costs	76.8	80.8 (10)
10. Corporate tax rate	75.8	82.4 (7)
11. Tax exemptions	73.2	80.6 (11T)
11T. State and local incentives	73.2	81.9 (8)

Figure 9: Quality of Place Factors

Ranking	2014	2013
1. Low crime rate	84.4	80.9 (1)**
2. Ratings of public schools	75.3	73.0 (4)
3. Health care facilities	74.2	79.7 (2)
4. Housing availability	69.7	71.5 (5)
4T. Housing costs	69.7	75.3 (3)
6. Colleges and universities in area	68.3	59.5 (7T)
7. Recreational opportunities	65.9	66.4 (6)
8. Cultural opportunities	60.8	54.8 (8)
9. Climate	60.0	59.5 (7T)

Source: Area Development Magazine, 2015

FIGURE 10: FREDERICKSBURG'S ASSETS AND CHALLENGES

Neutral ratings are not summarized in this report. Detailed data can be found in the **COMPETITIVE REALITIES REPORT**.

	Assets	Challenges
Access to Markets	• Centrally located for major regional market • Centrally located for national market • Well positioned to serve international markets • Interstate highways • Rail service	*No relative challenges*
Labor	• Availability of skilled clerical workers • Availability of technicians and scientists • Availability of post-secondary vocational training • Within ½ hour of major university/college	• Lack of skilled industrial workers • Lack of an engineering program
Economic Development Program	*No relative assets*	• Low level of awareness or understanding of the community regarding economic development • Low level of funding for local economic development program
Access to Space	*No relative assets*	• Lack of availability of fully served and attractive industrial sites
Access to Capital	• Availability of incentives to induce specific types of targeted development	• Lack of venture capital from local sources for business startups
Government Impact on Business	*No relative assets*	• Level of traffic-carrying capacity of local streets and highways • Business permitting procedures and costs
Quality of Place	• Level of cultural activity • Availability of medical care • Diversity of local eating establishments • Appearance of the Central Business District	• Cost-of-living index • Level of crime (property) • Availability of first-class hotels, motels, and resorts

Labor and Economic Trends

In addition to assessing Fredericksburg against criteria and measures employed by site selectors, work during Phase I examined the area's economic position against four benchmark cities: Charlottesville, Manassas, Winchester, and Staunton, as well as the Commonwealth of Virginia, and the nation as a whole. Because Fredericksburg must compete with other geographies in and around the Washington Metro area, it is important to know how it compares to those competitors. These benchmark geographies were selected by EDT.

Garner Economics used data that can be verified and for which comparisons with other cities or areas can be made at the level of detail preferred by most site-selection professionals. The most detailed demographics data, industry statistics, and comparative rankings were used because businesses considering Fredericksburg will do the same.

As the scorecards presented in the **Competitive Realities Report** (and replicated below) indicate, Fredericksburg has mixed results in terms of demographics, labor, and economics. Detailed information is included in the **Competitive Realities Report** on file with EDT.

Demographic & Labor Dynamics		
Population Growth	↑	Over the last decade, the total population of Fredericksburg has increased by 7,400 residents or 32.9%. The rate of growth is the highest among the four peer communities, Virginia, and the United States.
Sources of New Residents	⊖	From 2009-2013, Fredericksburg attracted 15.1% of its new residents from a *Different State*, which was higher than Manassas, Winchester, Staunton, and the United States but lower than Charlottesville and Virginia.
Age	↑	Fredericksburg has the highest percentage of residents in the 15-19 age category compared to the four peer communities, state, and nation. Conversely, the City ties Charlottesville for the lowest percentage of those above age 55 at 18.7%. Staunton has the highest population of those over 55 at 34.5%.
Crime	↓	In 2013, Fredericksburg's violent crime rate was above the state and nation and second highest among peer communities. Fredericksburg had the highest property crime rate among the peer communities, state, and nation.
Educational Attainment	↑	Fredericksburg has the highest proportion of those in the category *Some College, No Degree*. Conversely, the City has the lowest proportion of those in the *Less than 9th Grade* and the *9th to 12th Grade, No Diploma* categories. The proportion of those in the *Bachelor's Degree* and *Graduate or Professional Degrees* comes in third behind the state and Charlottesville.

Demographic & Labor Dynamics *(continued)*		
Secondary School Performance		Fredericksburg's SAT composite score is above the national average for public schools and two peer communities (Manassas, Staunton) but below the state, Charlottesville, and Winchester. At 63%, Fredericksburg ties Charlottesville in participation rate of seniors taking the test. The four-year graduation rate for Fredericksburg is above the nation but lower than the four peer communities and the state.
Population In-Migration by Educational Attainment		Among new residents ages 25 and over, Fredericksburg attracts the most with *Some College or Associate Degree* compared to the benchmarks, state, and nation. Fredericksburg also attracts the third-highest percentage of those with *Bachelor's Degrees*, behind Charlottesville and the nation.
Median Earnings by Educational Attainment		Among residents ages 25 and over, Fredericksburg has higher median earnings than the benchmarks, state, or nation for the category *Bachelor's Degree*.
Worker Flows		Only 10% of the total workforce employed in Fredericksburg are residents of the City—this number has increased by 333, or 16.8%, since 2003.
		From 2003 to 2012, the number of workers *Living in Fredericksburg but Employed Outside (out-commuters)* increased by 66.2% or 3,530 more workers. The number of workers *Employed in Fredericksburg but Living Outside (in-commuters)* increased as well, up 12.8% or 2,359 more workers. The mean travel time to work is 25 minutes.
Effective Labor Draw		The numbers of active residential workers in the 30-mile and 45-mile drive-time labor draw have grown over the past 10 years, growing around 1% annually. Active residential workers are those persons employed—one primary job is assigned per individual to prevent over counting.

Economic Dynamics		
Weekly Wage	↓	In 2014, the estimated average weekly wage in Fredericksburg was $782, which is the second lowest among the peer communities (Staunton is the lowest), 25% below the state, and 21% below the national average. The average value does not include those workers who live in Fredericksburg but work outside the area. The average annual wage for all Fredericksburg residents reported by the Census Bureau for 2011 to 2013 is much higher, at a value of $69,027.
Per Capita Income	↑	The per capita income in Fredericksburg was $28,212 in 2013, which was higher than the peer communities and the nation but below the state average of $33,103.
Self-Employment	↓	In 2013, 6.6% of workers in Fredericksburg were *Self-Employed*. The proportion is lower than three of the benchmark communities, the state, and the nation.
	↑	Median earnings among Fredericksburg workers classified as *Self-Employed in Own Incorporated Business* were $51,467, which is near the highest relative value of $51,600 in Winchester. Median earnings among those Fredericksburg workers classified as *Self-Employed in Own Not Incorporated Business* were the highest among the peer communities, state, and nation at $23,720.
Business Startups	↓	Fredericksburg's current total of new startup firms, an indicator of entrepreneurial activities, is half the number of the peak in 2005. Startup firms include all companies that began during the designated time frame, as reported by the Virginia Employment Commission as of 2014.
Labor Force Participation	⊖	Among residents ages 16 and over in Fredericksburg, 60.7% are employed, which is higher than three of the benchmark communities (Charlottesville, Winchester, and Staunton), the state, and the nation. Fredericksburg's unemployment rate is above the state average but lower than the national average. Among peer communities, Fredericksburg has the second-highest unemployment rate.
	⊖	Fredericksburg's proportion of families with two income earners is 35.3%, which is the lowest proportion compared to the four benchmark communities, the state, and nation. Fredericksburg did have the highest proportion of unmarried females in the labor force at 24.9%.
Household Income	⊖	Compared to the nation and the state, Fredericksburg has the total highest share of households with incomes in the $35,000 to $49,999 category. Fredericksburg's proportion of those above $75,000 is 30.9%, which is below the state average of 42.4% and the national average of 34.1%.

Economic Dynamics *(continued)*		
Major Industry Composition		Fredericksburg's industry employment percentages are highest in two sectors: Real Estate and Rental and Leasing and Accommodation and Food Services. Conversely, Fredericksburg has the lowest percentage of employment in six sectors.
Cost of Living		The 2014 composite cost-of-living index for Fredericksburg is estimated to be 121 (the national average is set at 100). Compared to the benchmark communities, Fredericksburg has the overall highest cost of living and highest housing costs, according to Areavibes.com Cost-of-Living Index. Areavibes.com uses C2ER (the most widely accepted cost-of-living data aggregator) as its data source.
Broadband		Households in Fredericksburg have the lowest availability (access) to DSL compared to the four peer communities, state, and nation. Fredericksburg's cable availability value of 86.1% is above the state average of 79.5% and just slightly below the national availability of 88.8%. Charlottesville has the highest availability of cable at 97.5%. With respect to download speeds, Fredericksburg's medium & large businesses experience higher median download speeds than Manassas, Winchester, the state, and nation.
Retail Leakage		Overall, Fredericksburg's average percentage of leakage is 31%, indicating that shoppers from Fredericksburg spend nearly 70% of their retail dollars within the city. Additionally, the City of Fredericksburg attracts retail shoppers from the surrounding area.

Local Specialization, Competitiveness & Growth

Below are general observations from an in-depth analysis of industry sectors and occupational groups within the City of Fredericksburg. This information is not benchmarked.

Major Industry Sector Change	✓ Job growth in the past five years in Fredericksburg has been led by *Government*, which added 194 jobs (+5%), *Educational Services*, which added 93 jobs (+36%), and *Real Estate and Rental and Leasing*, which added 55 jobs (+13%). The *Government* sector includes federal, state, and local publicly funded institutions, including public schools and universities. *Educational Services* includes private schools (K-12 and post-secondary) as well as tutoring services and professional training. ✓ There were significant job losses in five sectors: *Health Care and Social Assistance* (-260 jobs/4%); *Manufacturing* (-169 jobs/39%); *Professional, Scientific, and Technical Services* (-166 jobs/15%); *Wholesale Trade* (-156 jobs/29%); and *Other Services* (-146 jobs/13%).
Industry Earnings	✓ Industrial average earnings in Fredericksburg are below the national average in all major sectors except for *Health Care and Social Assistance* (18.1% higher) and *Construction* (3.9% higher). ✓ Sectors with the greatest imbalance in earnings relative to national averages were: *Management of Companies and Enterprises* (71.8% lower); *Information* (70.9% lower); *Manufacturing* (67.5% lower); *and Arts, Entertainment & Recreation* (138.8% lower).
Major Occupational Change	✓ Over the last five years, the single largest absolute occupational gains in Fredericksburg came from *Education, Training, and Library Occupations,* up 183 jobs or 16%.
Occupational Earnings	✓ Fredericksburg's median hourly earnings were above the nation for all occupations except for *Military*, *Sales and Related*, and *Transportation and Material Moving*.
Major Industry Sector Specialization & Growth	✓ There are two industry sectors in Fredericksburg with both high local specialization and growth in the past five years: *Government* and *Real Estate and Rental and Leasing.* ✓ The two *Emerging* industry sectors in Fredericksburg (low local specialization + recent growth) are *Educational Services* and *Finance and Insurance.*
Major Industry Competitiveness	✓ The strongest net local competitive effect was from *Government*. The region had negative local competitive effects in 15 sectors, including *Health Care and Social Assistance, Accommodation and Food Services,* and *Retail Trade.*
Occupational Specialization & Growth	✓ Two occupations had local specialization and recent growth: *Healthcare Practitioners and Technical* and *Military*. Six occupations with high local specialization are *At Risk* due to job losses over the past five years.

Chapter 2: Optimal Targets For Fredericksburg

The optimal business sectors target selection is based on the site-specific characteristics of the Fredericksburg-area economy. The recommended targets are for those engaged in recruiting new business to Fredericksburg to prioritize resources with those business sectors that offer the most promise for the City. These optimal targets hold a competitive advantage to the community and, thus, help policymakers prioritize the City's community and economic development strategy.

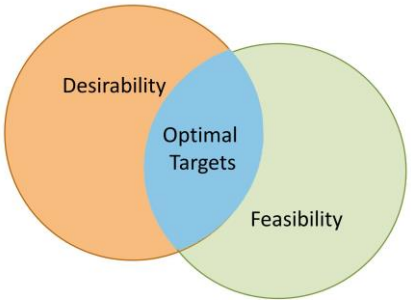
In selecting optimal targets, Garner Economics uses a desirability and feasibility screening matrix to determine the recommended targets. Desirability includes the types of business sectors the community would like to see in Fredericksburg (Figure 11). Feasibility includes what the area can actually achieve in the short- to mid-term, based on current or planned location assets and in conducting an analytical review of the local and regional economy.

Using results from the previously completed **Competitive Realities Report**, the **Assets and Challenges Assessment**, focus groups, and field visits, four business and industry groups were chosen that best match the unique competitive advantages in the area to the needs of particular industry sectors. Special attention is given to sectors in the midst of significant change or innovative transformation, with the strong likelihood that there will be increased interest in adding, growing, or moving operational sites or opportunities in the entrepreneurial arena of startups. Each sector selected has some sort of competitive advantage in the marketplace. Some sectors are already well established in the area and are positioned for additional growth. For others that are not as well established, there are opportunities to leverage Fredericksburg's assets in order to either attract existing businesses or to encourage entrepreneurs to start new ventures. For all targeted businesses, Fredericksburg's competitive advantages are presented, along with recent and projected performance of the targets at the national level. In some cases, target sectors are actually losing jobs nationally, but Fredericksburg's particular set of economic development assets still put it in position to capture demand.

Because economies are dynamic and impossible to precisely predict, these four optimal targets offer opportunities across several non-competing sectors, affording a means to diversify economic development strategies and avoid risky overconcentration.

The target information is presented in a practical and workable format, avoiding complex analysis and extensive projections of future outcomes. Instead, the justifications for the targets should be clearly apparent and make sense to the average practitioner. Under each major target sector, a list of individual subsectors is provided with accompanying NAICS classifications. A full description for each subsector target can be found in Table 9. Detailed subsector targets help to bridge the gap from broad economic concepts to a workable means for identifying specific prospective industries and firms.

Figure 11: Optimal Target Screening Process



For each target, a bulleted list of rationales is presented and identified as appealing to the needs of prospects (P) or the community (C). This material can be used in marketing and community support efforts or to help economic development personnel prioritize targeting efforts.

OPTIMAL TARGETS FOR FREDERICKSBURG

Tourism, Hospitality, and Specialty Retail	Science and Technology, R&D, Contracting, and Consulting	Professional and Corporate Office Users	Education and Health Services

MAJOR SUBSECTORS

Tourism, Hospitality, and Specialty Retail

- Upscale Traveler Accommodations
- Restaurants and Other Dining Establishments
- Scenic and Sightseeing Transportation
- Specialty Food Stores
- Gift, Novelty, and Souvenir Stores
- Art Galleries and Studios
- Craft Breweries and Distilleries
- High-End Specialty Boutique Retail

Science and Technology, R&D, Contracting, and Consulting

- Architectural, Engineering, and Related Services
- Management, Scientific, and Technical Consulting Services
- Scientific Research and Development Services
- Software Publishers
- Computer Systems Design and Related Services
- Satellite Telecommunications
- Data Processing, Hosting, and Related Services
- Facilities Support Services
- Cybersecurity
- Niche Process Light Manufacturing

Professional and Corporate Office Users

- Legal Services
- Accounting, Tax Preparation, Bookkeeping, and Payroll Services
- Management of Companies and Enterprises
- Office Administrative Services
- Business Support Services
- Regional and Corporate Headquarters for Private and Not-for-Profit Institutions
- Association Management Headquarters

Education and Health Services

- Business Schools and Computer and Management Training
- Educational Support Services
- Offices of Physicians, Dentists, and Other Health Practitioners
- Health Services Educational Institutions
- Outpatient Care Centers
- Medical and Diagnostic Laboratories
- Home Health Care Services
- Nursing and Residential Care Facilities

For each target, a bulleted list of rationales is presented and identified as appealing to the needs of either prospects (P) or the community (C).

Tourism, Hospitality, and Specialty Retail

Fredericksburg has a very well established base of tourism activity and retail businesses, centered on two areas: its Historic Downtown and the Central Park regional shopping center along I-95. In spite of its existing strengths, Fredericksburg is still lacking in terms of quality lodging, entertainment, nightlife, destination retail, and activity along the Rappahannock River.

The local area already has high job concentrations in the two primary sectors under this target cluster: *Accommodation/Food Services* and *Retail Trade*. It also has strong concentrations in occupations related to this cluster and a significant population of young adults who are able and willing to work for lower wages in part-time positions.

Fredericksburg's status as a cultural and heritage tourism destination located in close proximity to several major metro areas positions it well for growth in its tourism market in the next few years. The same factors that drive the area's appeal for heritage tourism—which tends to draw an older audience—will also allow it to attract younger visitors who are interested in outdoor, culinary, and arts attractions. Keeping in mind that, as the consumer changes their visitor preferences based on demographic changes, Fredericksburg must also continue to evolve with their attractions and what the visitor wishes to experience. The area is also well positioned to attract foreign visitors looking for deeper exposure to American history. Fredericksburg is also an attractive location for craft breweries and distilleries, which are expanding nationally due to their popularity among young adults.

In addition to expanding its appeal to tourists, Fredericksburg is also very likely to take advantage of its status as the only established Downtown district serving the booming residential areas in surrounding counties. Residents of Stafford, Spotsylvania, King George, and Caroline counties have few options for downtown shopping, dining, or entertainment that would compete with Fredericksburg.

Rationales

- Centrally located for regional and national markets (P)
- Interstate highways and rail service (P)
- Availability of post-secondary vocational training (P)
- Within ½ hour of major university/college (P)
- High level of cultural activity (P)
- Diversity of local eating establishments (P)
- Appearance of the Central Business District (P)
- High rate of population growth (P)
- High rate of educational attainment (P)
- High median household income level (P)
- High relative share of residents with bachelor's degrees (P)

"P" indicates appeals to Prospects; "C" indicates appeals to the Community

- Strong growth in regional labor force (P)
- High share of young adult population (P)
- Opportunity to create jobs for unmarried female workers (C)
- Opportunity to improve quality of hotels and lodging facilities (C) (P)
- Strong retention of retail sales in the market (P)
- Existing specialization in target subsectors and occupations (P)
- Average target subsector 2015 national earnings of $22,209 (P)
- Average target subsector 10-year past employment growth of 16.4% (C)
- Average target subsector projected 10-year job growth of 10.4% (C)
- An existing local pool of high-demand occupations (Table 2) (P)
- Quality-of-place assets: proximity to large metro areas, cultural activity, recreational opportunities, historic buildings, and areas (P)

Table 1: Tourism, Hospitality, and Specialty Retail Target Subsectors

NAICS	Description	National Earnings, 2015	2005–2015 National Job Growth	2015–2025 National Job Growth Forecast	National Job Count, 2015 (Millions)
312120	Breweries	$73,247	85.2%	34.6%	0.05
312140	Distilleries	$91,816	78.2%	23.1%	0.01
4452	Specialty Food Stores	$27,790	2.8%	5.9%	0.32
4481	Clothing Stores	$23,210	-0.6%	13.2%	1.18
453220	Gift, Novelty, and Souvenir Stores	$21,924	-20.0%	-9.9%	0.29
453920	Art Dealers	$30,678	7.8%	0.7%	0.07
487110	Scenic and Sightseeing Transportation, Land	$35,402	93.6%	35.1%	0.02
7211	Traveler Accommodations	$33,158	5.2%	5.2%	1.94
722410	Drinking Places (Alcoholic Beverages)	$19,283	3.3%	5.4%	0.44
7225	Restaurants and Other Eating Places	$19,553	22.0%	11.8%	10.20
	WEIGHTED AVERAGES/TOTALS	$22,209	16.4%	10.4%	14.50

Source: EMSI, Garner Economics

Table 2: Tourism, Hospitality, and Specialty Retail: Fredericksburg Existing Labor Pool of High-Demand Occupations–2015

Occupation	Employed in Fredericksburg
Retail Salespersons	1,296
Combined Food Preparation and Serving Workers, Including Fast Food	963
Waiters and Waitresses	910
Cashiers	907
Cooks, Restaurant	482
First-Line Supervisors of Retail Sales Workers	390
First-Line Supervisors of Food Preparation and Serving Workers	287
Food Preparation Workers	224
Dishwashers	166
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	161
Dining Room and Cafeteria Attendants and Bartender Helpers	154
Bartenders	133
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	113
Food Service Managers	81
Food Servers, Non-restaurant	67
Hotel, Motel, and Resort Desk Clerks	59
Amusement and Recreation Attendants	40
Lodging Managers	28
Concierges	26
Tour Guides and Escorts	18

Source: EMSI, Garner Economics

Science and Technology R&D, Contracting, and Consulting

This target group (Table 3) includes a mix of technology-oriented industry sectors that aim to capitalize on Fredericksburg's skilled and educated workforce. This cluster places a particular focus on those who live in the local area but commute to professional jobs in Northern Virginia or the District of Columbia. The industry groups found in this cluster are all poised to benefit from the convergence of global economic and technological forces. These subsector targets are responding to corporate clients' adaptation to rapid changes in customer expectations within an evolving technological landscape. Fredericksburg's proximity to the Washington, D.C. region is an asset for this group of industries. The metro D.C. area is among the leading locations in the United States for businesses involved in management consulting, R&D, computer systems design, data processing, cybersecurity, and other sectors that do business with the federal government. With digital transactions, virtual workplaces, and teleworking becoming the norm for many companies, lower cost areas close to Washington are poised to attract smaller businesses and/or startups from this cluster.

Fredericksburg is also positioned to attract businesses that provide goods and services that support and/or complement the professional services economy in the metro D.C. area. This includes firms that provide engineering services; website/data hosting, facilities support services, and manufacturing firms that produce specialty and/or high-tech products. The high wages paid by these industry sectors make them a particularly attractive target. Another target group is small niche manufacturers that produce high-end apparel, wood, and medical products aimed at affluent markets in the surrounding region.

Rationales

- Centrally located for regional and national markets (P)
- Interstate highways and rail service (P)
- High broadband speed for small businesses (P)
- Availability of technicians and scientists (P)
- Availability of post-secondary vocational training (P)
- Within ½ hour of major university/college (P)
- Availability of office and industrial space (P)
- Potential for use of incentives for targeted development (P)
- High rate of educational attainment (P)
- High median household income level (P)
- High relative share of residents with bachelor's degrees (P)
- High median earnings for *Self-Employed* workers (C)
- Strong wages in *Professional, Scientific, and Technical Services* (P)
- Competitive wages in *Information* sector (P)

"P" indicates appeals to Prospects; "C" indicates appeals to the Community

- Competitive wages in *Manufacturing* sector (P)
- Emerging growth in *Life, Physical, and Social Science* occupations (P)
- Opportunity to leverage presence of retired military, government, and contractor personnel (C)
- Ability to attract/retain the sizeable number of high wage earners who presently out-commute (C) (P)
- Average target subsector 2015 national earnings of $96,600 (C)
- Average target subsector 10-year past employment growth of 27.6% (C)
- Average major subsector projected 10-year employment growth of 20.2% (C)
- Strong existing local pool of high-demand occupations (Table 4) (P)
- Quality-of-place assets: moderate cost of living (compared to other parts of metro D.C.), cultural activity, recreational opportunities, appearance of CBD (P)

Table 3: Science and Technology R&D, Contracting, and Consulting Target Subsectors

NAICS	Description	National Earnings, 2015	2005–2015 National Job Growth	2015–2025 National Job Growth Forecast	National Job Count, 2015 (Millions)
315990	Apparel Accessories and Other Apparel Manufacturing	$40,815	-25.7%	-5.2%	0.02
31699	Other Leather and Allied Product Manufacturing	$43,333	20.0%	20.9%	0.02
337212	Custom Architectural Woodwork and Millwork Manufacturing	$56,150	20.6%	38.4%	0.02
33911	Medical Equipment and Supplies Manufacturing	$90,636	6.7%	6.8%	0.33
511210	Software Publishers	$151,134	34.4%	25.4%	0.37
517410	Satellite Telecommunications	$110,676	-39.2%	-6.9%	0.01
518210	Data Processing, Hosting, and Related Services	$96,089	18.1%	9.7%	0.38
5413	Architectural, Engineering, and Related Services	$87,609	6.4%	13.7%	1.62
5415	Computer Systems Design and Related Services	$104,709	43.2%	26.2%	2.30
5416	Management, Scientific, and Technical Consulting Services	$74,145	40.5%	24.8%	1.59
5417	Scientific Research and Development Services	$131,235	14.7%	14.8%	0.70
561210	Facilities Support Services	$52,074	10.8%	18.2%	0.17
	WEIGHTED AVERAGES/TOTALS	$96,600	27.6%	20.2%	7.54

Source: EMSI, Garner Economics

Table 4: Science and Technology, R&D, Contracting, and Consulting: Fredericksburg Existing Labor Pool of High-Demand Occupations–2015

Occupation	Employed in Fredericksburg
General and Operations Managers	326
First-Line Supervisors of Office and Administrative Support Workers	308
Bookkeeping, Accounting, and Auditing Clerks	265
Management Analysts	219
Financial Managers	110
Software Developers, Applications	105
Computer Systems Analysts	102
Network and Computer Systems Administrators	97
Computer User Support Specialists	87
Financial Analysts	81
Chief Executives	67
Office and Administrative Support Workers, All Other	61
Software Developers, Systems Software	60
Information Security Analysts	48
Computer Occupations, All Other	34
Computer Network Architects	33
Computer Network Support Specialists	32
Database Administrators	27
Civil Engineers	25
Web Developers	24
Computer Programmers	22
Architects, Except Landscape and Naval	18
Mechanical Engineers	17
Electrical Engineers	15
Electrical and Electronics Engineering Technicians	12

Source: EMSI, Garner Economics

Professional and Corporate Office Users

Fredericksburg's unique assets make it a competitive location for a range of companies. As a lower-cost market located along major transportation routes between Washington and Richmond, the City is well positioned for growth among firms that do business along the Northeast Corridor but do not have to be located in larger and more expensive markets.

Businesses in each of the sectors in this cluster will be largely oriented towards serving larger businesses located in the Mid-Atlantic region. There are several models for successful businesses, including firms that provide services to local residents, firms that support businesses in larger cities, branch offices of national or regional companies, or firms that move to the area to take advantage of its assets.

Fredericksburg's appeal will differ somewhat for each specific sector. Law and accounting firms will be able to take advantage of population growth in the surrounding area. Administrative and business support services companies can perform outsourced functions for companies in Washington, Richmond, or elsewhere. Regional or corporate headquarters can find affordable space in proximity to qualified workers that is still convenient to larger markets.

Another facet to this industry group is the effect of teleworking, co-working, and other trends. There are a growing number of individual employees who are able to work remotely but still seek an office environment outside their homes. Fredericksburg is an excellent location to attract these types of workers.

Rationales

- Centrally located for regional and national markets (P)
- Interstate highways and rail service (P)
- High broadband speed for small businesses (P)
- Availability of skilled clerical workers (P)
- Availability of post-secondary vocational training (P)
- Within ½ hour of major university/college (P)
- Availability of office and industrial space (P)
- Availability of loans and grants for small businesses (P)
- High rate of educational attainment (P)
- High median household income level (P)
- High relative share of residents with bachelor's degrees (P)
- High median earnings for *Self-Employed* workers (C)
- High rate of population and labor force growth (P)

"P" indicates appeals to Prospects; "C" indicates appeals to the Community

- Competitive wages in the *Professional, Scientific, and Technical Services* sector (P)
- Competitive wages in *Management of Companies and Enterprises* sector (P)
- High concentration of jobs in *Management of Companies and Enterprises* sector (P)
- Ability to attract/retain the sizeable number of high wage earners who presently out-commute (C)
- Average target subsector 2015 national earnings of $85,368 (C)
- Average target subsector 10-year past employment growth of 17.9% (C)
- Average major subsector projected 10-year employment growth of 11.3% (C)
- Strong existing local pool of high-demand occupations (Table 6) (P)
- Quality-of-place assets: moderate cost of living, cultural activity, recreational opportunities, appearance of CBD (P)

Table 5: Professional and Corporate Office Users Target Subsectors

NAICS	Description	National Earnings, 2015	2005–2015 National Job Growth	2015–2025 National Job Growth Forecast	National Job Count, 2015 (Millions)
5411	Legal Services	$92,693	0.4%	7.7%	1.50
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	$61,577	13.0%	7.6%	1.31
55111	Management of Companies and Enterprises	$125,386	30.7%	11.1%	2.40
561110	Office Administrative Services	$62,992	26.4%	18.8%	0.81
5614	Business Support Services	$39,324	16.2%	14.9%	1.24
813910	Business Associations	$77,858	0.6%	6.8%	0.14
813920	Professional Organizations	$89,205	15.8%	17.6%	0.09
	WEIGHTED AVERAGES/TOTALS	$85,368	17.9%	11.3%	7.48

Source: EMSI, Garner Economics

Table 6: Professional and Corporate Office Users: Fredericksburg Existing Labor Pool of High-Demand Occupations–2015

Occupation	Employed in Fredericksburg
Office Clerks, General	610
Receptionists and Information Clerks	405
General and Operations Managers	326
First-Line Supervisors of Office and Administrative Support Workers	308
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	292
Bookkeeping, Accounting, and Auditing Clerks	265
Accountants and Auditors	253
Customer Service Representatives	249
Management Analysts	219
Lawyers	154
Sales Representatives, Services, All Other	130
Billing and Posting Clerks	125
Financial Managers	110
Financial Analysts	81
Chief Executives	67
Office and Administrative Support Workers, All Other	61
Legal Support Workers, All Other	59
Paralegals and Legal Assistants	53
Legal Secretaries	27

Source: EMSI, Garner Economics

Education and Health Services

Education and Health Services presently forms the backbone of the Fredericksburg economy, particularly the *Health Care* industry, which accounts for 25 percent of all jobs in the City. Though the local *Health Care* sector has lost employment since 2011, *Educational Services* has been the fastest-growing private industry sector in Fredericksburg over that period.

These industries also lead the region in other ways, as documented in the **Competitive Realities Report** (Chapter 7). *Health Care* is the only major industry in the City with earnings that are significantly higher than national averages. The two occupational groups that comprise most of this sector added more jobs than any other since 2011. *Health Care* has the highest employment concentration of any industry in the City, and *Educational Services* is one of just three sectors that are considered *Emerging*—that is, it is not locally specialized, but it is adding jobs. Finally, *Educational Services* is one of just two private sectors that have grown at a faster rate locally than nationally since 2011.

In spite of the major presence and growth prospects of this cluster, the primary challenge for Fredericksburg will be to grow it beyond its local orientation. Although Mary Washington Hospital is a major employer and economic force, its services are primarily geared toward the local population, so its growth prospects are limited by the demographics of its service area. The City will need to find ways to leverage the hospital's presence to attract more doctors, health support services, diagnostic centers, etc.

For *Educational Services*, the local market is dominated by the University of Mary Washington and Germanna Community College, which, as public institutions, are actually considered as part of the *Government* sector. Growth in the private side of this industry will need to focus on companies that provide specialized workforce training that support and

Rationales

- Centrally located for regional markets (P)
- Availability of technicians and scientists (P)
- Availability of post-secondary vocational training (P)
- Within ½ hour of major university/college (P)
- Availability of housing at all price points (P)
- Availability of adequate medical facilities (P)
- High rate of population and labor force growth (P)
- High rate of educational attainment (P)
- High median household income level (P)
- High relative share of residents with bachelor's degrees (P)
- High concentration of employment in *Health Care* sector (P)
- Emerging growth in *Educational Services* sector (P)

"P" indicates appeals to Prospects; "C" indicates appeals to the Community

- Higher than national average wages in *Health Care* sector (C)
- Strong local competitive effect for *Health Care* sector (P)
- Strong growth for *Healthcare Practitioners and Technical* and *Education, Training, and Library* occupations (P)
- Average target subsector 2015 national earnings of $58,271 (C)
- Average target subsector 10-year past employment growth of 33.6% (C)
- Average major subsector projected 10-year employment growth of 23.5% (C)
- Strong existing local pool of high-demand occupations (Table 8) (P)
- Quality-of-place assets: moderate cost of living, cultural activity, recreational opportunities, appearance of CBD (P)

augment what is provided by these two public institutions.

Table 7: Education and Health Services Subsectors Target Subsectors

NAICS	Description	National Earnings, 2015	2005–2015 National Job Growth	2015–2025 National Job Growth Forecast	National Job Count, 2015 (Millions)
6114	Business Schools and Computer and Management Training	$47,272	12.3%	12.8%	0.18
611710	Educational Support Services	$43,814	50.5%	19.9%	0.22
621111	Offices of Physicians (Except Mental Health Specialists)	$101,436	20.5%	18.7%	2.72
621112	Offices of Physicians, Mental Health Specialists	$76,050	14.9%	12.1%	0.11
621210	Offices of Dentists	$61,185	16.9%	17.4%	0.98
6213	Offices of Other Health Practitioners	$45,387	43.4%	24.4%	1.44
6214	Outpatient Care Centers	$68,561	57.1%	33.0%	0.78
621511	Medical Laboratories	$69,199	38.4%	26.1%	0.21
621512	Diagnostic Imaging Centers	$72,069	10.2%	12.2%	0.08
621610	Home Health Care Services	$29,536	67.5%	38.3%	1.80
623110	Nursing Care Facilities (Skilled Nursing Facilities)	$38,213	4.8%	14.0%	1.66
623311	Continuing Care Retirement Communities	$33,380	53.7%	31.3%	0.47
623312	Assisted Living Facilities for the Elderly	$28,757	32.1%	23.6%	0.44
	WEIGHTED AVERAGES/TOTALS	$58,271	33.6%	23.5%	11.09

Source: EMSI, Garner Economics

Table 8: Education and Health Services: Fredericksburg's Existing Labor Pool of High-Demand Occupations–2015

Occupation	Employed in Fredericksburg
Registered Nurses	1,052
Nursing Assistants	303
Personal Care Aides	294
Medical Assistants	222
Licensed Practical and Licensed Vocational Nurses	163
Dental Assistants	110
Home Health Aides	108
Radiologic Technologists	104
Physicians and Surgeons, All Other	103
Family and General Practitioners	99
Medical and Clinical Laboratory Technologists	99
Physical Therapists	97
Medical and Clinical Laboratory Technicians	96
Mental Health Counselors	95
Teachers and Instructors, All Other	94
Nurse Practitioners	65
Clinical, Counseling, and School Psychologists	55
Respiratory Therapists	52
Dental Hygienists	49
Dentists, General	45
Physician Assistants	44
Medical Records and Health Information Technicians	42
Pediatricians, General	41
Occupational Therapists	38
Psychiatric Technicians	36
Speech-Language Pathologists	35
Cardiovascular Technologists and Technicians	35

Source: EMSI, Garner Economics

Table 8: Education and Health Services: Fredericksburg's Existing Labor Pool of High-Demand Occupations–2015 (continued)

Occupation	Employed in Fredericksburg
Nurse Anesthetists	26
Marriage and Family Therapists	26
Internists, General	26
Surgeons	26
Magnetic Resonance Imaging Technologists	21
Psychiatrists	15
Health Educators	13

Source: EMSI, Garner Economics

Table 9: Target Subsector Descriptions

Tourism, Hospitality, and Specialty Retail	
NAICS 312120	**Breweries**
This industry comprises establishments primarily engaged in brewing beer, ale, malt liquors, and nonalcoholic beer.	
NAICS 312140	**Distilleries**
This industry comprises establishments primarily engaged in one or more of the following: (1) distilling potable liquors (except brandies), (2) distilling and blending liquors, and (3) blending and mixing liquors and other ingredients.	
NAICS 4452	**Specialty Food Stores**
This industry group comprises establishments primarily engaged in retailing specialized lines of food.	
NAICS 4481	**Clothing Stores**
This industry group comprises establishments primarily engaged in retailing new clothing.	
NAICS 453220	**Gift, Novelty, and Souvenir Stores**
This industry comprises establishments primarily engaged in retailing new gifts, novelty merchandise, souvenirs, greeting cards, seasonal and holiday decorations, and curios.	
NAICS 453920	**Art Dealers**
This industry comprises establishments primarily engaged in retailing original and limited edition art works. Included in this industry are establishments primarily engaged in displaying works of art for retail sale in art galleries.	
NAICS 487110	**Scenic and Sightseeing Transportation, Land**
This industry comprises establishments primarily engaged in providing scenic and sightseeing transportation on land, such as sightseeing buses and trolleys, steam train excursions, and horse-drawn sightseeing rides. The services provided are usually local and involve same-day return to place of origin.	
NAICS 7211	**Traveler Accommodation**
This industry comprises establishments primarily engaged in providing short-term lodging in facilities known as hotels, motor hotels, resort hotels, and motels. The establishments in this industry may offer food and beverage services, recreational services, conference rooms and convention services, laundry services, parking, and other services.	
NAICS 722410	**Drinking Places (Alcoholic Beverages)**
This industry comprises establishments known as bars, taverns, nightclubs, or drinking places primarily engaged in preparing and serving alcoholic beverages for immediate consumption. These establishments may also provide limited food services.	
NAICS 7225	**Restaurants and Other Eating Places**
This industry comprises establishments primarily engaged in one of the following: (1) providing food services to patrons who order and are served while seated (i.e., waiter/waitress service) and pay after eating, (2) providing food services to patrons who generally order or select items (e.g., at a counter, in a buffet line) and pay before eating, or (3) preparing and/or serving a specialty snack (e.g., ice cream, frozen yogurt, cookies) and/or nonalcoholic beverages (e.g., coffee, juices, sodas) for consumption on or near the premises.	

Science & Technology, R&D, Contracting, and Consulting	
NAICS 315990	**Apparel Accessories and Other Apparel Manufacturing**
This industry comprises establishments primarily engaged in manufacturing apparel and accessories (except apparel knitting mills, cut and sew apparel contractors, men's and boys' cut and sew apparel, women's and girls' cut and sew apparel, and other cut and sew apparel). Jobbers, who perform entrepreneurial functions involved in apparel accessories manufacture, including buying raw materials, designing and preparing samples, arranging for apparel accessories to be made from their materials, and marketing finished apparel accessories, are included. Examples of products made by these establishments are belts, caps, gloves (except medical, sporting, safety), hats, and neckties.	
NAICS 31699	**Other Leather and Allied Products Manufacturing**
This industry comprises establishments primarily engaged in manufacturing leather products (except footwear and apparel) from purchased leather or leather substitutes (e.g., fabric, plastics).	
NAICS 337212	**Custom Architectural Woodwork and Millwork Manufacturing**
This U.S. industry comprises establishments primarily engaged in manufacturing custom designed interiors consisting of architectural woodwork and fixtures utilizing wood, wood products, and plastics laminates. All of the industry output is made to individual order on a job shop basis and requires skilled craftsmen as a labor input. A job might include custom manufacturing of display fixtures, gondolas, wall shelving units, entrance and window architectural detail, sales and reception counters, wall paneling, and matching furniture.	
NAICS 33911	**Medical Equipment and Supplies Manufacturing**
This industry comprises establishments primarily engaged in manufacturing medical equipment and supplies. Examples of products made by these establishments are surgical and medical instruments, surgical appliances and supplies, dental equipment and supplies, orthodontic goods, ophthalmic goods, dentures, and orthodontic appliances.	
NAICS 511210	**Software Publishers**
This industry comprises establishments primarily engaged in computer software publishing or publishing and reproduction. Establishments in this industry carry out operations necessary for producing and distributing computer software, such as designing, providing documentation, assisting in installation, and providing support services to software purchasers. These establishments may design, develop, and publish, or publish only.	
NAICS 517410	**Satellite Telecommunications**
This industry comprises establishments primarily engaged in providing telecommunications services to other establishments in the telecommunications and broadcasting industries by forwarding and receiving communications signals via a system of satellites or reselling satellite telecommunications.	
NAICS 518210	**Data Processing, Hosting, and Related Services**
This industry comprises establishments primarily engaged in providing infrastructure for hosting or data processing services. These establishments may provide specialized hosting activities, such as web hosting, streaming services, or application hosting; provide application service provisioning; or may provide general time-share mainframe facilities to clients. Data processing establishments provide complete processing and specialized reports from data supplied by clients or provide automated data processing and data entry services. This industry includes data centers.	
NAICS 5413	**Architectural, Engineering, and Related Services**
This industry comprises a range of establishments that provide architectural, landscape architectural, engineering, drafting, building inspection, geophysical surveying, mapping, surveying, and testing services.	

Science & Technology, R&D, Contracting, and Consulting (continued)	
NAICS 5415	**Computer Systems Design and Related Services**
This industry comprises establishments primarily engaged in providing expertise in the field of information technologies through one or more of the following activities: (1) writing, modifying, testing, and supporting software to meet the needs of a particular customer; (2) planning and designing computer systems that integrate computer hardware, software, and communication technologies; (3) on-site management and operation of clients' computer systems and/or data processing facilities; and (4) other professional and technical computer-related advice and services.	
NAICS 5416	**Management, Scientific, and Technical Consulting Services**
This industry comprises a range of establishments that provide consulting services related to one or more of the following fields: business, administrative management, human resources, marketing, logistics, or environmental.	
NAICS 5417	**Scientific Research and Development Services**
This industry comprises establishments primarily engaged in conducting research and experimental development in the physical, engineering, and life sciences, such as agriculture, electronics, environmental, biology, botany, biotechnology, computers, chemistry, food, fisheries, forests, geology, health, mathematics, medicine, oceanography, pharmacy, physics, veterinary, and other allied subjects. It additionally includes establishments primarily engaged in conducting research and analyses in cognitive development, sociology, psychology, language, behavior, economic, and other social science and humanities research.	
NAICS 561210	**Facilities Support Services**
This industry comprises establishments primarily engaged in providing operating staff to perform a combination of support services within a client's facilities. Establishments in this industry typically provide a combination of services, such as janitorial, maintenance, trash disposal, guard and security, mail routing, reception, laundry, and related services to support operations within facilities. These establishments provide operating staff to carry out these support activities but are not involved with, or responsible for, the core business or activities of the client. Establishments providing facilities (except computer and/or data processing) operation support services and establishments providing private jail services or operating correctional facilities (i.e., jails) on a contract or fee basis are included in this industry.	

Professional and Corporate Office Users	
NAICS 5411	**Legal Services**
This industry comprises offices of legal practitioners known as lawyers or attorneys (i.e., counselors-at-law) primarily engaged in the practice of law. Establishments in this industry may provide expertise in a range or in specific areas of law, such as criminal law, corporate law, family and estate law, patent law, real estate law, or tax law. It additionally includes the offices of notaries, title abstract and settlement offices, and all other legal services.	
NAICS 5412	**Accounting, Tax Preparation, Bookkeeping, and Payroll Services**
This U.S. industry comprises establishments of accountants that are certified to audit the accounting records of public and private organizations and to attest to compliance with generally accepted accounting practices. Offices of certified public accountants (CPAs) may provide one or more of the following accounting services: (1) auditing financial statements, (2) designing accounting systems, (3) preparing financial statements, (4) developing budgets, and (5) providing advice on matters related to accounting. These establishments may also provide related services, such as bookkeeping, tax return preparation, and payroll processing.	
NAICS 55111	**Management of Companies and Enterprises**
This industry comprises (1) establishments primarily engaged in holding the securities of (or other equity interests in) companies and enterprises for the purpose of owning a controlling interest or influencing the management decisions or (2) establishments (except government establishments) that administer, oversee, and manage other establishments of the company or enterprise and that normally undertake the strategic or organizational planning and decision making role of the company or enterprise. Establishments that administer, oversee, and manage may hold the securities of the company or enterprise.	
NAICS 561110	**Office Administrative Services**
This industry comprises establishments primarily engaged in providing a range of day-to-day office administrative services such as financial planning, billing and recordkeeping, personnel, and physical distribution and logistics for others on a contract or fee basis. These establishments do not provide operating staff to carry out the complete operations of a business.	
NAICS 5614	**Business Support Services**
This industry includes a range of sectors that provide services to other business types, including document preparation, telephone call centers, business service centers, collection agencies, credit bureaus, repossession, court reporting, and other related services.	
NAICS 813910	**Business Associations**
This industry comprises establishments primarily engaged in promoting the business interests of their members. These establishments may conduct research on new products and services; develop market statistics; sponsor quality and certification standards; lobby public officials; or publish newsletters, books, or periodicals for distribution to their members.	
NAICS 813920	**Professional Organizations**
This industry comprises establishments primarily engaged in promoting the professional interests of their members and the profession as a whole. These establishments may conduct research; develop statistics; sponsor quality and certification standards; lobby public officials; or publish newsletters, books, or periodicals, for distribution to their members.	

Educational and Health Services	
NAICS 6114	**Business Schools and Computer and Management Training**
This industry comprises establishments primarily engaged in offering courses in office procedures and secretarial and stenographic skills and may offer courses in basic office skills, such as word processing. These establishments may offer such classes as office machine operation, reception, communications, and other skills designed for individuals pursuing a clerical or secretarial career. It additionally includes establishments primarily engaged in conducting computer training (except computer repair), such as computer programming, software packages, computerized business systems, computer electronics technology, computer operations, and local area network management. It additionally includes establishments primarily engaged in offering an array of short duration courses and seminars for management and professional development. Training for career development may be provided directly to individuals or through employers' training programs, and courses may be customized or modified to meet the special needs of customers.	
NAICS 611710	**Educational Support Services**
This industry comprises establishments primarily engaged in providing non-instructional services that support educational processes or systems.	
NAICS 621111	**Offices of Physicians (Except Mental Health Specialists)**
This industry comprises establishments of health practitioners having the degree of M.D. (Doctor of Medicine) or D.O. (Doctor of Osteopathy) primarily engaged in the independent practice of general or specialized medicine (except psychiatry or psychoanalysis) or surgery. These practitioners operate private or group practices in their own offices (e.g., centers, clinics) or in the facilities of others, such as hospitals or HMO medical centers.	
NAICS 621112	**Offices of Physicians, Mental Health Specialists**
This industry comprises establishments of health practitioners having the degree of M.D. (Doctor of Medicine) or D.O. (Doctor of Osteopathy) primarily engaged in the independent practice of psychiatry or psychoanalysis. These practitioners operate private or group practices in their own offices (e.g., centers, clinics) or in the facilities of others, such as hospitals or HMO medical centers.	
NAICS 621210	**Offices of Dentists**
This industry comprises establishments of health practitioners having the degree of D.M.D. (Doctor of Dental Medicine), D.D.S. (Doctor of Dental Surgery), or D.D.Sc. (Doctor of Dental Science) primarily engaged in the independent practice of general or specialized dentistry or dental surgery. These practitioners operate private or group practices in their own offices (e.g., centers, clinics) or in the facilities of others, such as hospitals or HMO medical centers. They can provide either comprehensive preventive, cosmetic, or emergency care, or specialize in a single field of dentistry.	
NAICS 6213	**Offices of Other Health Practitioners**
This industry comprises a range of health care professionals, including chiropractors, optometrists, mental health practitioners, physical, occupational and speech therapists, audiologists, podiatrists, and other areas of expertise.	
NAICS 6214	**Outpatient Care Centers**
This industry includes establishments that provide specialized outpatient treatment such as family planning, mental health, substance abuse treatment, kidney dialysis, ambulatory surgery, and emergency care.	
NAICS 621511	**Medical Laboratories**
This industry comprises establishments known as medical laboratories primarily engaged in providing analytic or diagnostic services, including body fluid analysis, generally to the medical profession or to the patient on referral from a health practitioner.	
NAICS 621512	**Diagnostic Imaging Centers**
This industry comprises establishments known as diagnostic imaging centers primarily engaged in producing images of the patient generally on referral from a health practitioner.	

Educational and Health Services (continued)	
NAICS 621610	**Home Health Care Services**
This industry comprises establishments primarily engaged in providing skilled nursing services in the home, along with a range of the following: personal care services; homemaker and companion services; physical therapy; medical social services; medications; medical equipment and supplies; counseling; 24-hour home care; occupation and vocational therapy; dietary and nutritional services; speech therapy; audiology; and high-tech care, such as intravenous therapy.	
NAICS 623110	**Nursing Care Facilities (Skilled Nursing Facilities)**
This industry comprises establishments primarily engaged in providing inpatient nursing and rehabilitative services. The care is generally provided for an extended period of time to individuals requiring nursing care. These establishments have a permanent core staff of registered or licensed practical nurses who, along with other staff, provide nursing and continuous personal care services.	
NAICS 623311	**Continuing Care Retirement Communities**
This industry comprises establishments primarily engaged in providing a range of residential and personal care services with on-site nursing care facilities for (1) the elderly and other persons who are unable to fully care for themselves and/or (2) the elderly and other persons who do not desire to live independently. Individuals live in a variety of residential settings with meals, housekeeping, social, leisure, and other services available to assist residents in daily living. Assisted living facilities with on-site nursing care facilities are included in this industry.	
NAICS 623312	**Assisted Living Facilities for the Elderly**
This industry comprises establishments primarily engaged in providing residential and personal care services (i.e., without on-site nursing care facilities) for (1) the elderly or other persons who are unable to fully care for themselves and/or (2) the elderly or other persons who do not desire to live independently. The care typically includes room, board, supervision, and assistance in daily living, such as housekeeping services.	

Source: US Census Bureau, Garner Economics

CHAPTER 3: OBSERVATIONS—WHERE DO WE GO FROM HERE? A SITE SELECTOR'S PERSPECTIVE.

To ensure that Fredericksburg can leverage its many assets and strengthen its business climate to retain the companies it has, as well as attract its targets and others, the City must be proactive in shaping Fredericksburg's economic future and setting it apart from other peer jurisdictions.

The following observations, conclusions, and recommendations are based on data and feedback collected during Phase I and noted in the previously cited **COMPETITIVE REALITIES REPORT**. They also build upon the assessments made to prioritize the business targets identified in Chapter 2.

The resulting body of work suggests that the City has an opportunity to improve its business climate and make changes to its local development program to better attract the talent and companies that will create more opportunity within the City's boundaries. The recommendations look to build upon the many assets Fredericksburg has and to fill any product gaps.

As noted in the introductory chapters, this assessment—and the observations therein—were developed from a site-selector's perspective. The recommendations are built with an eye toward those areas that will differentiate Fredericksburg. The first goal of this master plan/strategy is to provide a framework for the City to consider its economic development service delivery and activities to support and augment the work of EDT and other City departments and organizations involved in economic development. Therefore, these recommendations are designed to go beyond traditional recruitment, expansion, and retention activities. The recommendations look at Fredericksburg and its economic future holistically and explore ways to better connect and leverage the City's talent and workforce, entrepreneurship, infrastructure, and business climate.

As with any strategy, there will be some elements that the City—and EDT in particular—can take on independently. There will be other initiatives that will need to be taken in collaboration with others or in support of others. The EDT will be a champion for the initiatives as a means to improving the City's competitiveness as a place to do business and one that can attract the types of talent that will drive the economy for years to come. The recommendations were written so as to calibrate the City's actions to its specific role.

Garner Economics developed the conclusions and recommendations with the following principles for the City in mind:

- **Undertake economic development activities in the context of work being done to strengthen not only the City, but also the entire region.** As noted frequently in the **COMPETITIVE REALITIES REPORT**, Fredericksburg is part of a dynamic and changing region. As a landlocked entity, it has the opportunity to better collaborate with and leverage the strengths of its neighbors. One goal of the master plan is to identify those areas where Fredericksburg can both attract and retain jobs and also support efforts within the broader region to build a stronger community and to be the chosen home for those jobs. Hence, the recommendations were created in a holistic manner. They provide a framework to capitalize on the City's unique assets while also strengthening the City's current "market" conditions.

  For Fredericksburg to capitalize on such potential, Garner Economics recommends that the EDT take a more proactive approach to driving the City's growth—changing parts of the City's economic development service delivery, working to improve the City's overall product, and better telling the story of the many assets Fredericksburg has to offer as a home for business.

- **Be a leader.** The success of the economic development strategy will depend not only on the changes the EDT makes regarding how it does business and services its clients, but also on its ability to be a leader within the City for making the case for such collaboration and change. Where there continues to be disagreement as to the future trajectory of Fredericksburg's growth, the EDT should work to build consensus around paths that are realistic given the City's assets and potential, as well as around those that provide a strong enough value proposition so as to differentiate Fredericksburg from its competitors and peers. Going forward, the economic development leaders in the City should make the case for how these new initiatives or the changes in policies will improve the City's business climate and, in turn, its ability to provide world-class economic development service delivery and opportunities for those it serves.

- **Maintain division of responsibilities among policymakers (City Council) and staff.** Policymakers, such as the Fredericksburg City Council, set the tone for business investment by creating a business climate that is conducive to economic growth. Quality growth and development occur when a community can provide a competitive advantage and create an atmosphere of success for individuals and firms when they make a capital investment in the community. Government's role is to provide a business climate that nurtures and promotes effective growth without being onerous for businesses of all sizes to operate profitably. Such governance is the key mission of the policymakers or City Council. It is the staff's responsibility to implement the policies adopted by the Council. Failure occurs when the Council attempts to meddle with implementation and/or attempts to do the staff's job. It is equally detrimental when staff tries to create policy. The recommendations provided below are predicated on this division of responsibilities.

Recommendations for action are categorized under three areas of opportunity: Enhance the Product (Product Improvement), Tell the Story (Marketing), and Execute Effectively (Organizational). In some instances, and where relevant and possible, a cost estimate to implement the noted recommendation has been offered.

ENHANCE THE PRODUCT

Product improvement initiatives to ensure Fredericksburg is in a competitive position to attract, retain, and grow the types of companies and industries it desires

TELL THE STORY

Product marketing actions for Fredericksburg to share the economic dynamism of the City with target prospects and talent

EXECUTE EFFECTIVELY

Organizational adjustments that allow the City of Fredericksburg to align its mission and focus on those areas that will directly impact the economic growth the community desires

Enhance the Product (Product Improvement)

The City's "product" is defined as the infrastructure—including a favorable business climate—needed to attract investment in the City. Local marketing efforts are only successful if the City has a community "product" to sell, including sites and buildings, transportation infrastructure, utility infrastructure, workforce development, leadership, and incentives.

Strategy:

Further develop assets and initiatives in key areas, such as talent and connectivity, which support the area's desire to attract and grow more high-quality economic activities in the City and to support the current and future residents of Fredericksburg.

Goal/Results:

Fredericksburg strengthens its quality of place and talent pipeline that attract and retain the region's most talented people and companies.

1. Create a Tourism Product Development Fund (TPDF).

Observation: At 16.3 percent, the *Accommodations and Food Service* sector is the City's third-largest employment sector, just behind *Health Care* and *Government*. Because of the City's small geographic footprint, which is landlocked for future growth, growing the hospitality sector is a viable option to the City's efforts of developing the local economy. But to do so, the City must enhance its portfolio of tourism product, including those facilities that may sell room nights and, as such, attract the overnight visitor, which then has a multiplier effect on the local economy.

Recommendation: The City should enact a Tourism Product Development Fund of an additional 1 percentage point to the existing 6 percent lodging tax. This fund would be set aside explicitly for product development that could be specifically correlated to the potential sale of room nights—for example, the development of youth sports venues or a performing arts venue, etc. Based on the current number of rooms and revenue associated with the lodging tax in Fredericksburg, this additional 1 percentage point would reasonably generate $250,000 per year. The Fredericksburg Economic Development Authority (EDA)—with input from the hospitality sector—could be the review committee for applicants related to the fund. Any monies not used during a fiscal year would roll over to an escrow account, which could be used in a future year. These funds would not be placed in the overall general fund budget.

Best practice example:

Asheville, North Carolina
http://www.ncleg.net/Sessions/2001/Bills/House/HTML/H105v4.html

http://bctda.org/product-development/

2. **Update the Jump Start Plan of 2006 to document what has been accomplished and what needs to be refined based on changes in the local economy.**

Observation: The City of Fredericksburg's location within a fast-growing region led to a recognized need for economic development visioning and planning throughout the entire community. The EDA responded to this need for economic development visioning and planning to lead a professional design and implementation process in 2005, referred to as the Jump Start Plan. The plan is now 10 years old, and much has changed in the local and regional economy since the plan was devised.

With an understanding of where Fredericksburg currently stands (through the previously published COMPETITIVE REALITIES REPORT) and the economic development challenges and opportunities it currently faces, the City now needs to decide where it wants to go from here. Does the City want to rival peer communities such as Charlottesville or Staunton by creating the 21st-century version of a convergence of place for goods and ideas? Or is it content to merely get whatever types of businesses decide to locate within its borders?

> "I think it would be good for City politicians and bureaucrats to engage in an all-in series of strategy sessions to agree on who we are as a City, and for all agencies to focus together and communicate better to make sure that not only a particular department can thrive, but that the entire City can thrive and achieve the goal of a successful, well-balanced, historically significant element of the Commonwealth."
>
> —Survey Respondent

Recommendation: Assuming the former option is the City's choice, Fredericksburg should update the Jump Start Plan and define what it wants to be in 2016 and beyond and create the tools to help it get there—neighborhood by neighborhood. It is our understanding that the City is currently going through a request for proposals (RFP) process to undertake this type of initiative, and we endorse this much needed effort. In addition to setting a goal for Fredericksburg's future and a roadmap to attain it, the visioning process will help Fredericksburg brand and differentiate itself from other communities.

The City need not be all things to all people. Rather, it should decide on and form its own future "personality" and take the steps to build it, while still embracing its historic culture and uniqueness. Public input will be helpful in setting parameters for the City's future goals. The City leadership should take that input and decide which direction it will bring the City and how it will execute the vision.

The process will be an involved one and should be intentional. It should include steps to gain a broad sense of what the community wants and what the City can deliver. It should also look for areas of commonality between the wards and potential leverage points where the plans of one ward can support those of another. There should be outreach to a broad spectrum of community stakeholders to discuss future economic opportunities in Fredericksburg, the potential given the availability of land and existing sites, and the public investment needed.

By taking on the charge of defining the community's future desired economy, the City will position itself as a proactive leader and will have a roadmap to guide its actions going forward.

Lead organization for implementation: City of Fredericksburg Community Planning and Building Department with outside counsel and land-use planning expertise to lead and facilitate the process.

Best practice examples: Several cities of various sizes have undertaken such a process to envision their futures. By looking at select experiences, Fredericksburg can get a sense of the process that is entailed.

One example is PlaniTulsa, a citywide process to update Tulsa's Comprehensive Plan by creating a new vision for the city and setting forth guidelines for the physical development of the city. Input was garnered from the entire community through public workshops, stakeholder interviews, and a public survey. The process also identified a set of guiding principles that will serve as the foundation for future planning efforts. The PlaniTulsa effort is run out of the Mayor's office with the City Planning Office being the lead. The effort also had a consulting team consisting of an urban and regional planning team, transportation experts, an economic development team, and a research arm. http://planittulsa.org/

Another example is Charlotte City Center. Facilitated by the Charlotte Center City Partners, the plan envisions and implements strategies and actions to drive the economic, social, and cultural development of Charlotte's Center City. The Partners work to create a Center City that is a sustainable, visitor-friendly place where residents want to live. The Partners tout the area's modern infrastructure, a tapestry of unique neighborhoods, and a diversity of thriving businesses.

http://files.charlottecentercity.org/2020/Charlotte2020VisionPlan_1_Intro.pdf

Cost: $125,000 +/-

3. Create a Culinary Institute at Germanna Community College.

Observation: The *Accommodations and Food Service* sector is a dominant employer in Fredericksburg and many in the community have noted the draw that the varied restaurant offerings have in distinguishing Fredericksburg's Downtown. Fredericksburg's standing as a culinary destination can grow with a good talent pool.

Recommendation: The *Accommodations and Food Service* sector enjoys brand recognition and buzz in Fredericksburg. Additionally, the Downtown Historic Business District regularly experiences a continued influx of new restaurants, which attract a diverse population and visitors' base. Therefore, creating a culinary program—such as a certificated/accredited culinary studies effort—will add to Fredericksburg's cachet as a new mecca for diverse and quality restaurant options. The logical place for this education initiative would be at Germanna Community College. The Fredericksburg Campus (which is in Spotsylvania County) would be an ideal location, with another possibility being a new or adapted facility within the corporate limits of Fredericksburg.

Best practice examples:

- Asheville-Buncombe Technical Community College and its Brewing, Culinary, and Hospitality program https://www.abtech.edu/brewing-culinary-hospitality
- Cape Fear Community College and its Culinary Technology program http://cfcc.edu/publicservice/culinary/

4. **Provide the public free, high-speed Internet access to enhance the visitor and resident experience in the Core Business District and in disadvantaged neighborhoods where access is limited based on affordability.**

Observation: Access to broadband infrastructure is critical to the development of distressed areas and is an enabling platform for rapidly growing business sectors such as e-commerce, social networking, online education, health IT systems, and delivery of public services. High-speed connections are increasingly becoming a fundamental infrastructure element rather than a luxury for an area. The basic premise of carpeting an area with wireless service in urban centers is that it is more economical to the community to provide the service as a utility rather than to have individual households and businesses pay private firms for such a service. Such networks are viewed as capable of enhancing city management and public safety, especially when used directly by city employees out in the field. They can also be viewed as a social service to those who cannot afford private high-speed services such as DSL.

Most important, however, is the need to have the availability of a wireless network to attract business investment. Having a free, wireless conduit attracts mobile entrepreneurs or people who can work anywhere and choose to live and start their business in a location based on that location's quality of place. Free, high-speed wireless Internet access attracts mobile entrepreneurs and fits well with the vibe the City of Fredericksburg wishes to cultivate as a technology-oriented, "hip" city where people of all ages can thrive.

Recommendation: Fredericksburg should take action to build a free, high-speed wireless node, preferably throughout the City, but in the Downtown and in distressed neighborhoods, at the least. This effort will show residents, visitors, and entrepreneurs that the community has embraced technology and supports a mobile workforce. By working with appropriate vendors to create areas Downtown and in specific, disadvantaged neighborhoods that have access to free, high-speed wireless Internet connections, Fredericksburg will not only create an amenity that will draw activity to the area, but will also provide an added utility and asset to some of the economically disadvantaged populations noted above.

Best practice examples:

- Old Town Alexandria, Virginia
  http://www.alexandriava.gov/news_display.aspx?id=14280
- Amherst, Massachusetts
  http://amherstma.gov/index.aspx?NID=805
- Anderson, Indiana
  http://www.cityofanderson.com/wifi.aspx
- Ponca City, Oklahoma
  http://www.poncacityok.gov/index.aspx?NID=417
- Mountain View, California (in conjunction with Google)
  http://www.mountainview.gov/services/learn_about_our_city/free_wifi.asp.

5. **Placemaking: Create a plan to improve gateways into the City—including new signage and landscaping.**

Observation: As noted by focus group participants and survey respondents, the gateways into Fredericksburg are either nondescript or are in disrepair.

Recommendations: As a way to welcome both visitors and potential businesses, the City should work to improve major gateways by enhancing landscaping and creating signage that clearly indicates entrance into the City's boundaries and into the Historic Downtown and the Central Business District. Work should also be done to encourage redevelopment or refurbishing of structures near the gateways to complement the facelift. By improving the overall appearance and creating a unified brand, the City can make itself more distinct and build a sense of community pride. Signage can carry the city's branding also recommended in this report.

Best practice examples:

- **Augusta, Georgia:** The City of Augusta, Georgia, formed a public/private partnership between the Georgia Department of Transportation, the Augusta Convention and Visitors Bureau, local businesses, and concerned citizens to work on several projects beautifying the City's major corridors. For each of these projects, the group has commissioned plans, conducted bids, managed construction, and continues to oversee ongoing weekly landscape maintenance. http://www.augustaga.gov/index.aspx?NID=1695
- **Jersey City, New Jersey:** The Gateway Beautification program in Jersey City, New Jersey, sought to enhance the appearance of the Gateway areas and to make them safer by upgrading planting; maintaining trees, shrubs, evergreens, and flowering plants; and installing paved walkways and crosswalks, decorative steel fencing, flag and banner poles, and lighting. The program is run by the Jersey City Division of Economic Development.
- **Midland, Michigan:** The wayfinding and gateways program in Midland, Michigan, reflects the Frank Lloyd Wright-inspired architecture on gateways, parks, and recreational areas. The case for such an extensive wayfinding program is in reinforcing the entire urban brand through placemaking.

6. Work to attract an upscale boutique hotel Downtown, based on the rationale from a market analysis.

Greenville, South Carolina

Observation: In addition to building the skill sets within the City to strengthen and grow Fredericksburg's hospitality sector, the City lacks facilities, especially Downtown, where visitors can be enticed to consider Fredericksburg as a destination rather than a stop on a day-trip. The City must work tirelessly to enhance its product offerings to visitors based on consumer preferences. The utilization of a tourism product development fund (i.e., Recommendation 1 above) provides the opportunity for product development to occur.

Recommendation: As noted in the COMPETITIVE REALITIES REPORT, AAA reports that there are no four- or five-diamond hotel properties in Fredericksburg. Yet, much of Fredericksburg's economy is driven by the hospitality sector. Currently, the Commonwealth of Virginia has only one five-diamond property: The Inn at Little Washington. There are 21 four-diamond properties in Virginia http://augustafreepress.com/made-list-virginia-four-five-diamond-restaurants-properties-2015/.

There could be a multitude of reasons why a hotel developer has not taken the initiative or risk to develop a high-end property in Fredericksburg. The drivers (or lack thereof) could be cost, the local regulatory environment, or perceived lack of demand. However, a market analysis should be commissioned to determine whether the Fredericksburg hospitality sector could sustain a high-end, boutique hotel that would attract affluent visitors. If the market analysis returns positive, the City will, in all likelihood, need to incentivize a hotel developer to place one in Fredericksburg, just as the City/EDA would do to attract an industrial or office sector company. Incentives could include sales and lodging tax rebates, the use of the monies from the suggested Tourism Product Development Fund, expedited permitting, the EB-5 Visa program used to attract foreign investment, Tax Increment Financing, Virginia's Tourism Development Financing Program, etc.

Anaheim, California, is one of many examples where the city council has a specific incentive policy to attract AAA four-diamond properties or higher. To do so, the Anaheim City Council voted to offer room-tax breaks as incentives to developers of high-end resort properties. Under the plan, developers of AAA four-diamond hotels would keep 70 percent of their bed taxes for up to 20 years, with 10 percent going to the City and 20 percent to pay off bonds issued in the 1990s for city resort district improvements.

7. Create a broad and actionable river master plan, and create venues as part of a river development strategy (including a performing arts venue).

Observation: The Rappahannock River is a significant asset for Fredericksburg, but it is not currently used to its full potential. While there are limitations to river access, leveraging the river as a recreational asset can strengthen the City's quality of place. The City is working at different levels to enhance the viability of the river, such as efforts to create a riverfront park. Private sector initiatives include the Mill District and One Hanover (pending various city approvals). However, what is lacking is a true, comprehensive plan that guides development over the next decade and beyond.

Chattanooga, Tennessee

Recommendation: The City does not have a formal land-use master plan that visualizes what the river could become from both public and private investment, and through citizen input and then buy-in. It is recommended that the City engage a land-use planning group that has experience in riverfront development, so that a feasible and true actionable plan can be developed to lead to the creation of a new product, e.g., a performing arts venue.

In conjunction with the river master plan, Fredericksburg should develop a performing arts venue along the river. In the community engagement process, many respondents cited a dire need for a performing arts venue, such as an amphitheater. This type of project would fit perfectly within the purview of projects that would qualify for funding from the proposed Tourism Product Development Fund and would add to the quality of place for the City and its list of amenities for families and young professionals

Best practice examples:

- **For the River Plan**
  Chattanooga, Tennessee:
  http://www.rivercitycompany.com/new/projects

- **For the Performing Arts Venue**
  Peachtree City, Georgia: http://www.amphitheater.org/
  Cary, North Carolina: http://www.quinnevans.com/work/the-cary-theater/

8. Update the Desman Parking Study of 2006.

Observation: The City retained the services of *Desman Associates*, a professional consultant, to conduct a comprehensive parking report, which was delivered in 2006. Since 2006, there has been new investment Downtown, which has resulted in more businesses, visitors, and population density. The consultant offered 14 recommendations, some of which have been implemented. Additionally, technology that can help the public and municipalities improve the utilization and management of existing parking inventory has been developed. In focus groups and in feedback from the electronic survey for this master plan, the availability of parking in the Downtown area was considered a top priority.

Recommendation: Before further investment in parking infrastructure is made, the City should revisit and review the *Desman Associates* study, taking note of recommendations that have not been implemented, what is still applicable, and whether a new study is necessary to get a third-party perspective on necessary changes and improvements as the Downtown continues to evolve.

Tell The Story (Marketing)

In being more proactive, Fredericksburg and the EDT have the opportunity to tell the City's story more effectively and to be better spokespeople for the economic dynamism of the community. Site-location advisors and companies within the targeted industries and clusters are the primary audience for such efforts.

Strategy:

Tell Fredericksburg's economic development story more effectively to a more targeted audience of potential companies and investors.

Goal/Results:

The City is better able to attract the types of companies that will leverage the City's many assets and increase the quantity and quality of economic opportunities for its citizens.

1. Rebrand (or create) a Fredericksburg unified brand.

Observation: The EDT website shows no brand identity or tag line. The City's general government website also shows no brand identity. The VisitFred.com website (poor name for a URL, but Visit Fredericksburg takes you to Fredericksburg, Texas) has two conflicting messages or brands: "Timeless" and "The Greatest Vacation in History."

Recommendation: Fredericksburg needs an overall brand identity that can be used comprehensively by the City and the EDT for both business development and tourism promotion.

In a recent webinar touting how tourism can have a positive influence on traditional economic development activities, Atlas Advertising noted the following:

- Places leave the most lasting impressions, tangible or intangible, on human beings. And, human beings still make the decision where a company stays or relocates to and, similarly, where they want to vacation.
- As the world becomes more competitive at a faster and faster rate, choices for visitors and companies get harder. Digital has become the game-changer.
- As companies work to locate where the workforce is and visitors seek out their next vacations, how your brand attracts and retains those audiences is the destination challenge of the next 25 years.
- Having a brand gives you the tools to have a real dialogue about your place.

As such, the EDT should engage a firm that specializes in brand development to create a unified brand for the City of Fredericksburg.

Cost: $25,000-50,000

Best practice examples: Columbus, Indiana; Virginia Beach, Virginia; Branson, Missouri; Kokomo, Indiana; Raleigh, North Carolina.

2. Execute a process for lead generation and business target profiling.

Observation: Historically, the EDT has not proactively pursued targeted industries, nor has it institutionalized a lead generation program. Such a program would allow the EDT to effectively identify and prioritize prospects and would provide the industry expertise to qualify such prospects.

Recommendation: To offer the City the best opportunities for investment, the EDT should engage a firm that will target the universe of companies within the industry targets and sub-targets noted in this report that will offer the area the best opportunity for investment within each sector.

The targeting process is scientific in nature and evaluates key company performance metrics including sales, employment, growth, number of locations, and other relevant factors. Company activities and events that indicate expansion or consolidation—such as mergers and acquisitions, executive changes, technology development, and overall industry trends—are used to identify the target companies that have the means and indicative corporate behavior to consider an expansion opportunity in the short- and medium-term. Engaging a firm with such capacity will better enable EDT to conduct its marketing efforts in a very focused and direct manner. Garner Economics can provide a list of qualified firms that specialize in this work if desired.

Cost: $15,000 - 35,000

3. Actively solicit and provide information to site-location consultants.

Observation: Because the business development efforts of the EDT have historically been mostly reactive, little has been done to proactively provide information to location consultants. While most site-location advisors maintain their own databases based on published data and news reports, the firms also appreciate customized outreach from economic development organizations, such as the EDT, to alert them to developments or improvements that may not be captured by the above sources. In addition to reminding the location consultants of Fredericksburg's assets, such outreach also serves to help build an ongoing relationship with the given firm.

Recommendation: The EDT should call on-site location consultants that represent these targeted companies to explain the benefits of locating in the region. Many of these consultants are based in Atlanta, Chicago, Dallas, and the New York/New Jersey Metro area. The EDT should have a formalized visitation program to update firms in each of these cities once or twice a year, preferably in partnership with the Fredericksburg Regional Alliance and/or the Virginia Economic Development Partnership.

Cost: $8,500 annually

4. **Develop familiarization (FAM) events for consultants and companies.**

Observation: While the EDT can present itself and its assets well on paper (and on its website), the best way to introduce the many assets the City has to offer to location advisors and companies is to allow them to experience the City firsthand. Site-location consultants typically handle 30 percent of all location advisory work in the United States (which means companies do 70 percent of their investment analyses internally). Engaging these consultants is a cost-effective way to introduce Fredericksburg to corporate relocation decision-makers and extend the Fredericksburg brand. Especially given the population growth the City has undergone in recent years, as well as the mixed perceptions that external audiences may appear to have of the City, the EDT has an opportunity to make a new impression with this important audience.

Recommendation: Once a year, the EDT, in partnership with the Fredericksburg Regional Alliance, should contract with an organization such as the Site Selectors Guild, an association of the world's foremost professional site-selection consultants, to conduct a two-day tour of the City. Such "familiarization" or "FAM" events allow experts to discover the City firsthand and/or be briefed on updates and enhancements to the City's business climate. Successful FAM events are predicated on having some sort of draw that will attract high-quality consultants, and that reinforces the unique brand of the region and its value as a business location.

http://www.siteselectorsguild.com/themes/site_themes/ssg/uploads/AdvisoryForums.pdf

Cost: $25,000-35,000 each year, depending on the number of consultants or interactions desired.

5. **Enhance the EDT website to address the needs of location consultants and potential investors.**

Observation: Though the EDT website contains information that is of value to potential investors in many facets, it is difficult to find existing data on the current website. The website currently has a cluttered feel to it and is not graphically appealing. An Economic Development Organization's (EDO) website is its most important marketing tool to attract investment into the region.

Recommendation: Given the above, the EDT website needs to be designed to offer the resources that meet its primary and specific audiences' needs.

Since the tourism component is part of the EDT's purview, the EDT has a separate website and portal named VisitFred.com, in partnership with the Stafford and Spotsylvania EDT's. This site also needs an audit and redesign since it has the same characteristics of the City's EDT website of being cluttered and containing multiple messaging. Tourism information is included on the overall EDT website—but, because it is a separate and distinct audience, it is recommended that all tourism data have a separate website and separate portal/URL. The VisitFred site is a regional tourism

promotion effort, but Fredericksburg still needs to enhance its existing data and photography related to its visitor promotion on its current site (i.e., www.fredericksburgva.com/VisitFredericksburg/.

As the EDT strengthens its business development and marketing efforts for the City, its website should be adjusted to provide the information needs and the interests of location advisory audiences and companies doing site searches on their own. The site's navigation functionality, graphic appeal, and available data should be built and directed to these external audiences.

From the perspective of a location advisory firm, Garner Economics suggests the following recommendations to enhance the EDT website. Some of the suggested functionality may exist, but overall site navigation could be improved for a better or easier web experience:

- Navigation should be restructured to better serve each target sector, especially for recruitment. Successful websites have oriented navigation by audience type, such as the four business targets noted in Chapter 2: Tourism, Hospitality, and Specialty Retail; Science and Technology, R&D, Contracting, and Consulting; Professional and Corporate Office Users; and Education and Health Services.

Contrast of EDO websites

- Data most commonly considered in the location process by site selectors and corporate end-users should be available and easily accessible. The data compiled for Fredericksburg from the **COMPETITIVE REALITIES REPORT** should be used.
- Branded, thematic maps should be created to orient and inform website visitors.
- Have specific data related to retail and enhance the hospitality promotion, as currently is the case now.
-

Best practice examples:

- EDC of Southwest Indiana : http://www.southwestindiana.org
- Charlotte Regional Partnership : http://charlotteusa.com
- Asheville Convention and Visitors Bureau: http://www.exploreasheville.com

Cost: $35,000

EXECUTE EFFECTIVELY (ORGANIZATIONAL)

Strategy:

Build a focused economic development service delivery mechanism for existing and potential businesses in the City, and collaborate with other entities to work more seamlessly and present a unified brand to external clients.

Goal/Results:

The City is better able to attract the types of industries and talent that will make Fredericksburg even more competitive.

1. **Staff a City business investment and retention ombudsman in the City manager's office.**

   Observation: There is not a true ombudsman with a direct liaison to the city manager's office and, in turn, to the policymakers on city council, where businesses or potential investors can work with policymakers and government officials to facilitate the investment process.

   Recommendation: Though the City has the EDT, there needs to be a liaison, typically within the city manager's office to serve as a facilitator to resolve issues of concern.

   Since most assistance that can be provided to existing (or potential) companies typically emanates from local government, municipalities need to have a strong business retention and expansion initiative. Most important—and a point discussed by many in the business climate focus groups conducted for this exercise—is for government staff associated with economic development to be customer-friendly and willing to identify alternative resolutions to an issue rather than taking an attitude of "no." Being adaptive and flexible is important in garnering success with companies in job creation and capital investment.

2. Create a one-stop permitting office to streamline the permit process and create an internal culture of "yes."

Observation: Economic development wealth-building occurs when private investment causes a snowball effect of more private investment. The role of government in the economic development process is to nurture a strong business climate and implement a service delivery mechanism that serves as a catalyst and facilitator for investment to occur rather than as an inhibitor. In our focus group session with small businesses, we heard some criticism of the City's permitting and inspections process as it relates to inconsistencies in the local business permitting procedures (pages 7, 10, 13 and 21 in the COMPETITIVE REALITIES REPORT).

Recommendation: Fredericksburg should consider a one-stop permitting office or using tracking software to make the currently cumbersome process more customer friendly. As it is now, a business person or developer must make repeated visits to multiple offices to pay fees individually, or must visit multiple departments to undertake and get approval for a single project. A one-stop permitting office would be a positive influence in the business climate of the City. It not only provides efficiencies in the flow of approval and permitting on a local level, it adds to the City's cachet of being innovative and creative in nurturing private investment for all of the City. Many times, municipal planners and inspections personnel are construed as regulators with a culture of "no." Not to lessen the role that government needs to play to protect the character of a city, it also needs to instill in its employees a culture of "yes" to spur private investment and to enhance the economic vitality of Fredericksburg.

Typically, a one-stop review center to streamline the permit system provides citizens and businesses with a central reviewing agency located in one office. At a One-Stop Center, a single permit for construction can be issued for building, landscaping, zoning, environmental resources, drainage, public safety (fire), and driveways, etc.

Alternatively, technology exists that can enable customers to track the development process so that a business developer and city officials can view the current information about the status of a given project. Additionally, the City should improve it systems to allow one-stop payment for all fees associated with a project.

Best practice examples:

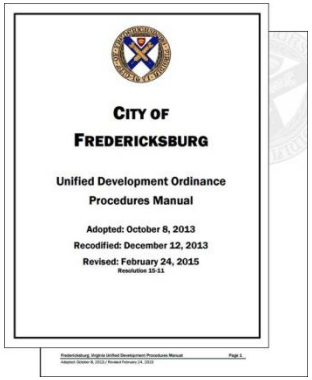
- City of Redlands, California
  http://www.cityofredlands.org/permitcenter
- City of Ocala, Florida
  http://www.ocalafl.org/GM/GM3.aspx?id=2427

3. Move the EDT's management and business promotion offices to a more corporate environment.

Observation: The EDT is currently housed at the City's Visitor Center on Caroline Street. It is an ideal location for a visitor's center and its related tourism offices. It does not show well to potential corporate investors. A community's economic development office, like a Chamber of Commerce, is considered the "living room" to the community. The EDT's offices are not conducive to the image Fredericksburg wishes to convey to potential community investors to as a city of quality.

Recommendation: The EDT (less the tourism promotion staff) should find offices that are more conducive to Class A office space and present the City in a favorable manner to potential investors, e.g. Central Park Corporate Center, Eagle Village.

4. Conduct a third-party, unbiased review of the Unified Development Ordinance.


CITY OF
FREDERICKSBURG

Unified Development Ordinance
Procedures Manual

Adopted: October 8, 2013
Recodified: December 12, 2013
Revised: February 24, 2015
Resolution 15-11

Observation: The Unified Development Ordinance (UDO), adopted in 2013 and which guides the development process in Fredericksburg based on the stipulations within the ordinance, has elicited much feedback by the development community as being exceptionally unwieldy and bureaucratic, inflexible, too costly to implement, and overly burdensome. At the same time, those on the regulatory side of the UDO feel it is just and fair with the expressed purpose of managing growth effectively and ensuring that the character of Fredericksburg is never compromised.

Recommendation: After reviewing a summary of the UDO and hearing feedback from both sides of the argument, it is recommended that the City engage a third-party, unbiased review of the ordinance from a respected group such as the Urban Land Institute (ULI). The Urban Land Institute provides leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. ULI is an independent, global nonprofit supported by members representing the entire spectrum of real estate development and land-use disciplines.

5. Promote local entrepreneurship.

Observation: The Kauffman Foundation suggests that, nationally, new firms and young businesses disproportionately contribute to net job creation throughout the economy and account for more than two-thirds of gross job creation. Data from the COMPETITIVE REALITIES REPORT suggest that such activity is weak in Fredericksburg. Self-employment comprises 6.6 percent of the local workforce, which is the second lowest behind the benchmark city of Manassas. But self-employment earnings in Fredericksburg are nearly tied at the top at $51,467. Nevertheless, focus groups, in particular, noted that efforts to support small businesses are not widely communicated and are perceived to be nascent.

EAGLEWORKS

EagleWorks (EW) is a business incubation center housed at the University of Mary Washington Center for Economic Development (UMW CED). EW extends business development services to local startup and early-stage companies looking to grow their enterprises. Additionally, the University of Mary Washington Small Business Development Center (UMWSBDC) is a resource center that provides assistance to the small business community via management training, industrial and demographic research, and confidential one-on-one consulting with a focus on capital access and management planning.

Additionally, the Economic Development Authority made a startup grant to The Foundry, a co-working space where business and professional development assistance is available to encourage entrepreneurship.

Recommendation: The EDT should build upon the momentum created by the programming at UMW and help small businesses and startup firms be more productive and innovative.

To begin, the EDT should more aggressively communicate the various resources within the City and region to existing small businesses/startups. It (or a designated organization) should also work with groups that are involved in education and workforce development—including local community and four-year colleges, Fredericksburg Public Schools, and other vocational and technical schools—to include entrepreneurship as a fundamental economic development tenet and embed entrepreneurship in the ethos of the City. This will be done collectively by teaching individuals and companies both what it takes to bring an idea to market and how they can better leverage available resources within the City, as well as helping to identify connections among entrepreneurs and larger companies to help them grow and prosper.

As a tangible first step, the EDT should build out a "Starting a New Business" page on the EDT website to describe the services offered for small and new business in the City.

Best practice example:

City of Lynchburg—Opportunity Lynchburg
http://www.opportunitylynchburg.com/

6. Keep tourism part of the organizational structure of the EDT.

We typically do not make recommendations related to the status quo. But some policymakers have inquired as to whether the EDT should be split from the tourism functions and be autonomous from the traditional side of the economic development office. Garner Economics firmly believes this would be an error to do and the status quo should remain with the current EDT structure.

With a small geography of 10.2 square miles and a small budget for tourism and business development promotion, it makes complete sense to keep the EDT structured as-is. Locations like Hilton Head Island; Hot Springs, Arkansas; Nashville; Asheville; and many more all have the economic development (business development and retention) and tourism functions under one roof.

7. Advocate for and develop a realistic and sustainable incentive policy for the City.

Observation: The City has established tourism and technology zones where, with certain criteria, new or expanding businesses can receive a rebate of certain taxes paid for the capital investment or employment levels they achieve. Incentives are a part of the competitive landscape in economic development, and the City must have a clear, executable policy that city staff can confidently present to business prospects. The incentives should be targeted to agreed-upon business subsectors. Policies are written for the benefit of business and the public. Incentives that follow policy should be approved at an administrative level, with the exception of extraordinary cases or cases where an exception to the policy is contemplated. However, ratification of incentives by policymakers is usual and customary. The risk, of course, is that Council will change the rules during the process, which, in turn, will usually result in the project finding another location. Though being adaptive and flexible in incentive offerings has merit, most (not all) companies, consultants, and developers would prefer to see a uniform incentive structure based on the value of the capital investment, jobs created, and total economic impact on the community. In short, the investor would like to know the ground rules up front as it relates to incentives.

Recommendation: To properly and more accurately set expectations for companies considering investment in the City, the City should develop a uniform incentive policy that incorporates those policies and procedures with the level of incentives calibrated to projected economic impact of the project and the projected return on investment to the community. The City EDT should post this information on an easily accessible page on its website. Policies will include clawback provisions and a return on investment/economic impact analysis, which should be done by the EDT on behalf of the City at time of application by the company applicant.

Best practice example: Wichita and Sedgwick County, Kansas

http://www.sedgwickcounty.org/finance/incentive_policy.asp

CHAPTER 4: CONCLUSION

With its strong sense of community, historical heritage and significance, central location within the Washington, D.C., and Richmond, Virginia, metro areas, and access to federal resources, Fredericksburg has many assets upon which it can build. However, the City realizes that— if it is to adequately prepare for growth and create more and better opportunities for its citizens—more must be done to proactively welcome investment to the community, while still protecting the fabric that makes the community what it is today. In doing so, the City must find consensus around the type of community it wants to be. It must also confront the challenges that are impeding it from being a competitive place for business and talent to locate.

Through ***Embracing History and Progress***, City leaders can make long-term organizational and structural investments to ensure that Fredericksburg can attract the types of activity it wants and that will support growth, while also taking on game-changing initiatives to augment Fredericksburg's quality of place assets. Such bold and strategic steps noted previously will transform Fredericksburg into a place that attracts quality talent and companies while maintaining its character and commitment to quality.

In order to create such change, the City will need to be more proactive and execute its economic development efforts differently. It will need to take the lead in proposing and attracting different types of activities and be a champion for long-term investments that will add to the City's product and quality of place for its citizens. In other words, the City must take on a more structured approach to economic development by creating new assets and ensure that the correct level of personnel and attention is paid to the City's economic growth, especially as it relates to being more adaptive and flexible to encourage investment.

Inherent in this change will be a more proactive and outward-facing marketing and attraction effort. In addition to targeting the optimal industries noted earlier in this report, Fredericksburg must work with other economic development partners and stakeholders to create and encourage the development of the spaces and places where such activity will occur. In doing so, Fredericksburg will become a more competitive place for businesses.

***

Garner Economics would like to thank the Fredericksburg Economic Development and Tourism staff, the City of Fredericksburg, the EDA and the economic development strategy steering committee, the more than 46 people who participated in the focus groups, and the 469 people that participated in the electronic survey for their help and assistance during this process. Their feedback, compilation of data, and information, as well as their openness and willingness to explore various opportunities to strengthen operations, have contributed to the richness and rigor of this report.

Recommendations Summary

The results of this work validate that Fredericksburg has many current strengths upon which it can build. The key to the City's future success will be to solidify a consensus vision for the future and to take on the leadership, aspirations, and resources to catalyze that change in the community. By taking proactive action to set its own trajectory, the City of Fredericksburg can ensure that it can provide economic opportunities for its residents, businesses, and future residents.

The following is a summary of the recommendations offered in ***Embracing History and Progress***. These were developed given the analysis and assessment taken during the first two phases of the project.

Strategy	Goal/Result	Actions	Timing
Enhance the Product (Product Improvement) Further develop assets and initiatives in key areas, such as talent and connectivity, which support the area's desire to attract and grow more high-quality economic activities in the City and to support the current and future residents of Fredericksburg.	Fredericksburg strengthens its quality of place and talent pipeline that attract and retain the region's most talented people and companies.	1. Create a Tourism Product Development Fund.	2017
		2. Update the Jump Start Plan of 2006 to document what has been accomplished, and what needs to be refined based on changes in the local economy.	2017-2018
		3. Create a Culinary Institute at Germanna Community College.	2018
		4. Provide the public free, high-speed Internet access to enhance the visitor and resident experience in the Core Business District and in disadvantaged neighborhoods where access is limited based on affordability.	2017
		5. Placemaking: Create a plan to improve gateways into the City—including new signage and landscaping.	2017-2018
		6. Work to attract an upscale, boutique hotel Downtown (market analysis).	2017-2018
		7. Create a broad and actionable river master plan, and create venues as part of a river development strategy.	2018
		8. Update the Desman Parking Study of 2006.	2017

Strategy	Goal/Result	Actions	Timing
Tell the Story (Marketing) Tell Fredericksburg's economic development story more effectively to a more targeted audience of potential companies and investors.	The City is better able to attract the types of companies that will leverage the City's many assets and increase the quantity and quality of economic opportunities for its citizens.	1. Rebrand (or create) a Fredericksburg unified brand. 2. Execute a process for lead generation and business target profiling. 3. Actively solicit and provide information to site-location consultants. 4. Develop familiarization (FAM) events for consultants and companies. 5. Enhance the EDT website to address the needs of location consultants and potential investors.	2017 2017-2021 2018 2017 2016-2017
Execute Effectively (Organizational) Build a focused economic development service delivery mechanism for existing and potential businesses in the City, and collaborate with other entities to work more seamlessly and present a unified brand to external clients.	The City is better able to attract the types of industries and talent that will make Fredericksburg even more competitive.	1. Staff a City business investment and retention ombudsman in the City manager's office. 2. Create a one-stop permitting office to streamline the permit process and create an internal culture of "yes." 3. Move the EDT's management and business promotion offices to a more corporate environment. 4. Conduct a third-party, unbiased review of the UDO. 5. Promote local entrepreneurship. 6. Keep tourism part of the organizational structure of the EDT. 7. Advocate for and develop a realistic and sustainable incentive policy for the City.	2017 2017 2017 2017-2018 2017 Ongoing 2017

About Our Company

Garner Economics, LLC provides innovative economic and community development solutions in a competitive global market. We offer site selection, analytical research, industry targeting, strategic planning, and organizational development with a wealth of expertise to companies, communities, and organizations globally. Garner Economics is based in Atlanta, Georgia, and has representative offices in both Europe and Asia.

Since 2003, Jay Garner, a 35-year internationally recognized expert in the economic development, chamber of commerce, and site location consulting professions has headed our team, which is rounded out by talented experts.

Cyndi Dancy, a research analyst for Garner Economics, served as the author of the economic and labor analysis. David Versel, principal and analyst for Garner Economics, conducted the target industry analysis. Tina Valdecanas, Senior Associate and Strategist for Garner Economics, led the stakeholder input sessions and analysis. Jay Garner conducted the **Assets and Challenges Assessment** and served as the team leader for this engagement.

Team members can be contacted as follows:

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Appendix A: Metrics Templates

The purpose of these economic metrics is for the City (the EDT and the City Council) to measure the economic vitality of Fredericksburg on an annual basis.

1. Economic benchmarks for the City of Fredericksburg

Variable	2013	2014	2015
Population	27,816	28,305	29,877
Median age	29.6	30.0	N/A
Crime rates (per 100,000 residents):			
Violent	401.2	449.3	N/A
Property	3,991.4	4,112.1	N/A
Educational attainment			
Bachelor's degree %	19.5%	21.3%	N/A
Graduate degree %	15.6%	16.4%	N/A
Self-employment %	6.8%	6.8%	N/A
Median household income	$47,040	$49,454	N/A
Weekly wage	$765	$782	N/A
Poverty rate %	18.6%	19.2%	N/A
Covered employment	24,398	23,701	N/A

Data Sources:

- Population: US Census Population Estimates
- Median Age: US Census American Community Survey (ACS) 5-year averages
- Crime: FBI Uniform Crime Report
- Educational Attainment: US Census ACS 5-year averages
- Self-Employment %: US Census ACS 5-year averages
- Household Income: US Census ACS 5-year averages
- Weekly Wage: US Bureau of Labor Statistics (BLS), Quarterly Census of Employment and Wages (QCEW), Annual Average
- Poverty Rates: US Census ACS 5-year averages
- Covered Employment: BLS, QCEW Annual Average

Note: US Census American Community Survey (ACS) does not provide 1-year data geographies with population under 65,000. ACS data will be provided each year with 5-year averages for all areas regardless of size. Using 5-year data will not show change as fast as 1-year data but will ensure the availability of data each year with the most precise data of the ACS ***offerings****.*

2. Operational benchmarks for the City's Department of Economic Development and Tourism

Variable	2015	2016	2017
Total new jobs from recruitment and local expansion			
Jobs from expansion			
Jobs from new investment			
Capital investment that the EDT helped facilitate			
Number of suspect (leads)			
Number of prospects (visits)			
Number of new company locates			
Number of new startups facilitated			
Annual community satisfaction survey for the EDT (optional variable)			

Garner | Economics LLC
solutions that work

May 5, 2016

Embracing History and Progress: Creating an Economic Development Master Plan for Fredericksburg, Virginia

Presented to
The Fredericksburg City Council

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Project Team

GARNER ECONOMICS provides creative, strategic and executable value to companies, communities and organizations globally.

We are specialists as corporate site location advisors and economic development strategists.

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Project Plan and Methodology

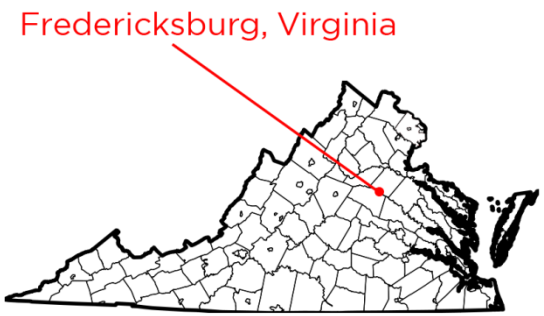
Our Philosophy for Achieving Success

Effective economic development strategies take a holistic approach

- Economic Development = wealth building
- How do you achieve economic development? First, build or strengthen the product. Then, create investment from:
  - Hunters (recruitment, including tourism and retail)
  - Gardeners (entrepreneurial)
  - Nurturers (support existing businesses)

Desired Outcome

The focus of the engagement was to help Fredericksburg strengthen the area's business climate, assist the area in increasing its economic competitiveness, and differentiate the community from peers in the Washington metro area and other competitive locations.



Project Process

Phase 1: Discovery

Task 1.1: Demographic & Economic Analysis	Task 1.2: Labor Market & Cluster Analysis
Task 1.3: Assets and Challenges Assessment	Task 1.4: Business and Industry Target Identification
Task 1.5: Organizational Analysis	Task 1.6: Performance Metrics and Benchmarking
Community Engagement	

Competitive Realities Report

Phase 2: Strategy

Business retention	Product (community) planning and development	Entrepreneurship development	Business recruitment and marketing	Workforce needs

Phase 3: Recommendations & Final Report

High-level implementation plans for actionable items

Product Improvement	Marketing	Organizational
Mitigating gaps	Targeted business recruitment Marketing strategy for target sectors	Effective ED service delivery

Client Review/ Feedback

Final Report and Presentation to the City of Fredericksburg

Public Input

- Garner Economics held 4 **focus groups** with 46 stakeholders to solicit their perceptions and opinions of the business climate in Fredericksburg.
- An **electronic survey** was distributed to the broader community and garnered 469 responses.

Common Comments & Concerns

Overarching key themes that emerged from both focus group participants and survey respondents include:

- Desire for more streamlined interaction with the City
- Pride in and desire to protect the City's historic/ small-town aspects
- Desire to attract more jobs and stem out-commuting patterns
- Need for improved traffic/accessibility along I-95 & the rail corridor
- Desire for more, true regionalism
- Need to optimize the use of the Rappahannock River
- Desire for an easier mechanism to deal with the City
- Optimism about Fredericksburg's future

Assets and Challenges Assessment

Garner Economics analyzed the City against forty-seven variables—the same that are used when conducting a site/community evaluation for a company that is considering a new location, expansion, consolidation or closure.

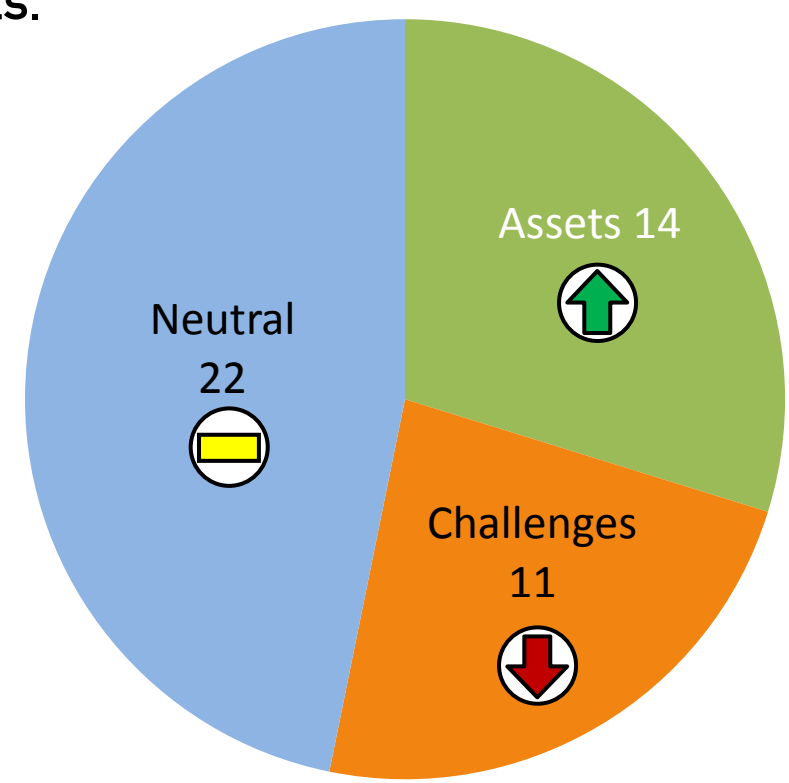
Challenge is defined as a weakness of a specific variable determined by Garner Economics either objectively or subjectively. A challenge could be an impediment to economic development success.

Neutral is defined as a variable that is not a challenge to economic development but is considered normal in the realm of economic analysis.

Asset is defined as a variable that is ranked exemplary and as such should be marketed or noted as such.

Assets and Challenges Assessment

Fredericksburg has several challenges. The future goal will be to strengthen those items currently ranked "neutral" or "challenge" and turn them into assets.



Results of 47 variables assessed

Strengths

Access to Markets

- Centrally located for major regional market
- Centrally located for national market
- Well positioned to serve international markets
- Interstate highways
- Rail service

Labor

- Availability of skilled clerical workers
- Availability of technicians and scientists
- Availability of post-secondary vocational training
- Within ½ hour of major university/ college

Access to Capital

- Availability of incentives to induce specific types of targeted development

Quality of Place

- Level of cultural activity
- Availability of medical care
- Diversity of local eating establishments
- Appearance of the Central Business District

Weaknesses

Labor

- Lack of skilled industrial workers
- Lack of an engineering program

Local ED Program

- Low level of awareness or understanding of the community regarding economic development
- Low level of funding for local economic development program

Availability of Space

- Lack of availability of fully served and attractive industrial sites

Access to Capital

- Lack of venture capital from local sources for business startups

Government Impact on Businesses

- Level of traffic-carrying capacity of local streets and highways
- Business permitting procedures and costs

Quality of Place

- Cost-of-living index
- Level of crime (property)
- Availability of first-class hotels, motels, and resorts

Neutral Scores

Access to Markets

- Within 60 miles of commercial air passenger service
- General aviation airport capable of handling corporate aircraft
- Broadband rankings

Labor

- Availability of managerial personnel
- Cost of labor

Access to Space

- Availability of fully served and attractive office sites and space

Local ED Program

- Adequate level of professional staff
- Involvement of both public and private sectors
- Local economic development organization has a strategic plan
- Level of leadership support of economic development program
- Level of cooperation between various organizations involved in economic development activity

Access to Capital

- Availability of low-interest loans or grants for small business

Neutral Scores

Government Impact on Businesses

- Availability of adequate water and wastewater treatment capacity
- Condition and maintenance of local streets
- High school SAT test scores assessment
- Local property taxes

Quality of Place

- Availability of executive-level housing
- Availability of moderate-cost housing
- Availability of apartments
- Availability of recreational opportunities
- General appearance of the community
- Availability of major shopping facilities

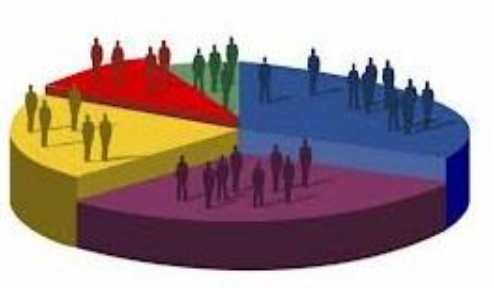
Fredericksburg's Competitive Assessment

Dashboard Indicators

Three Main Sections

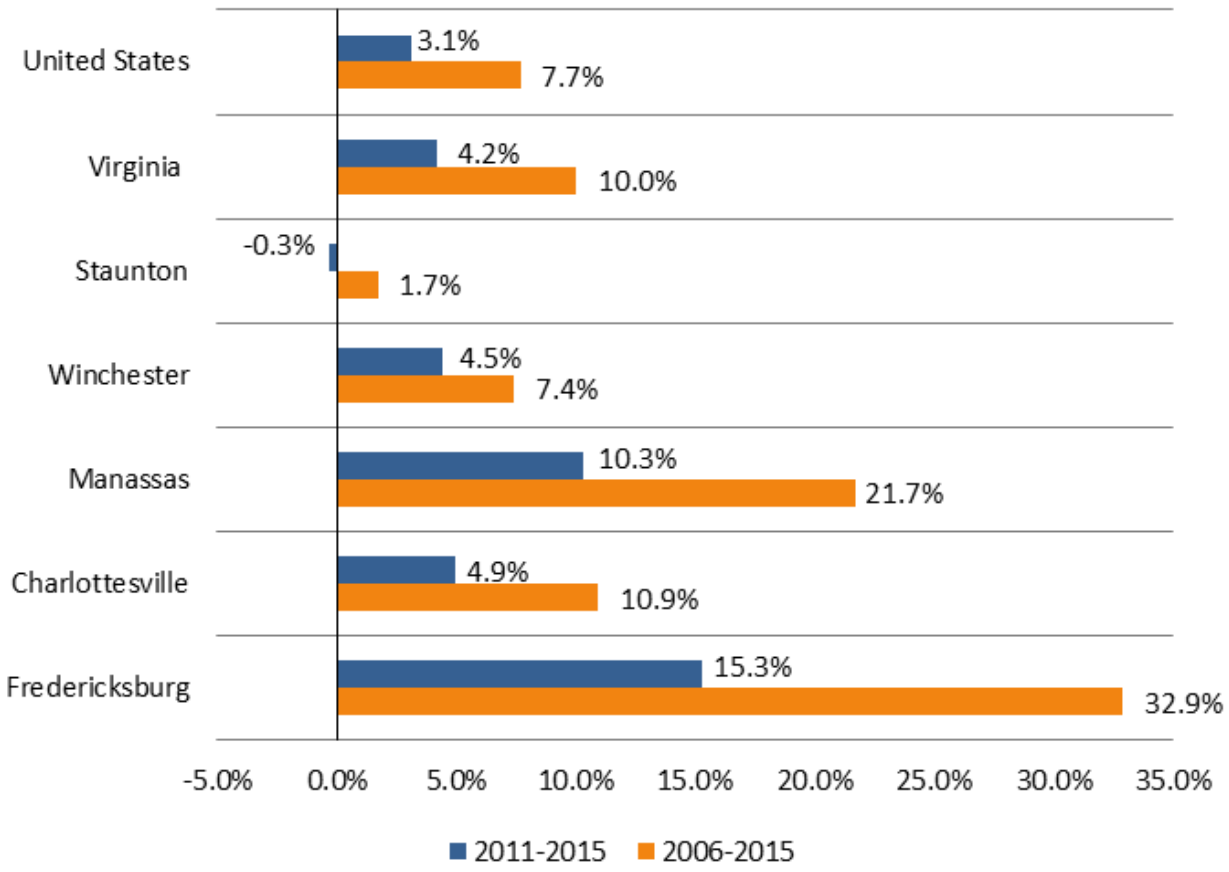
- Demographic & Labor Dynamics
- Economic Dynamics
- Local Specialization, Competitiveness & Growth

Demographic and Labor Dynamics



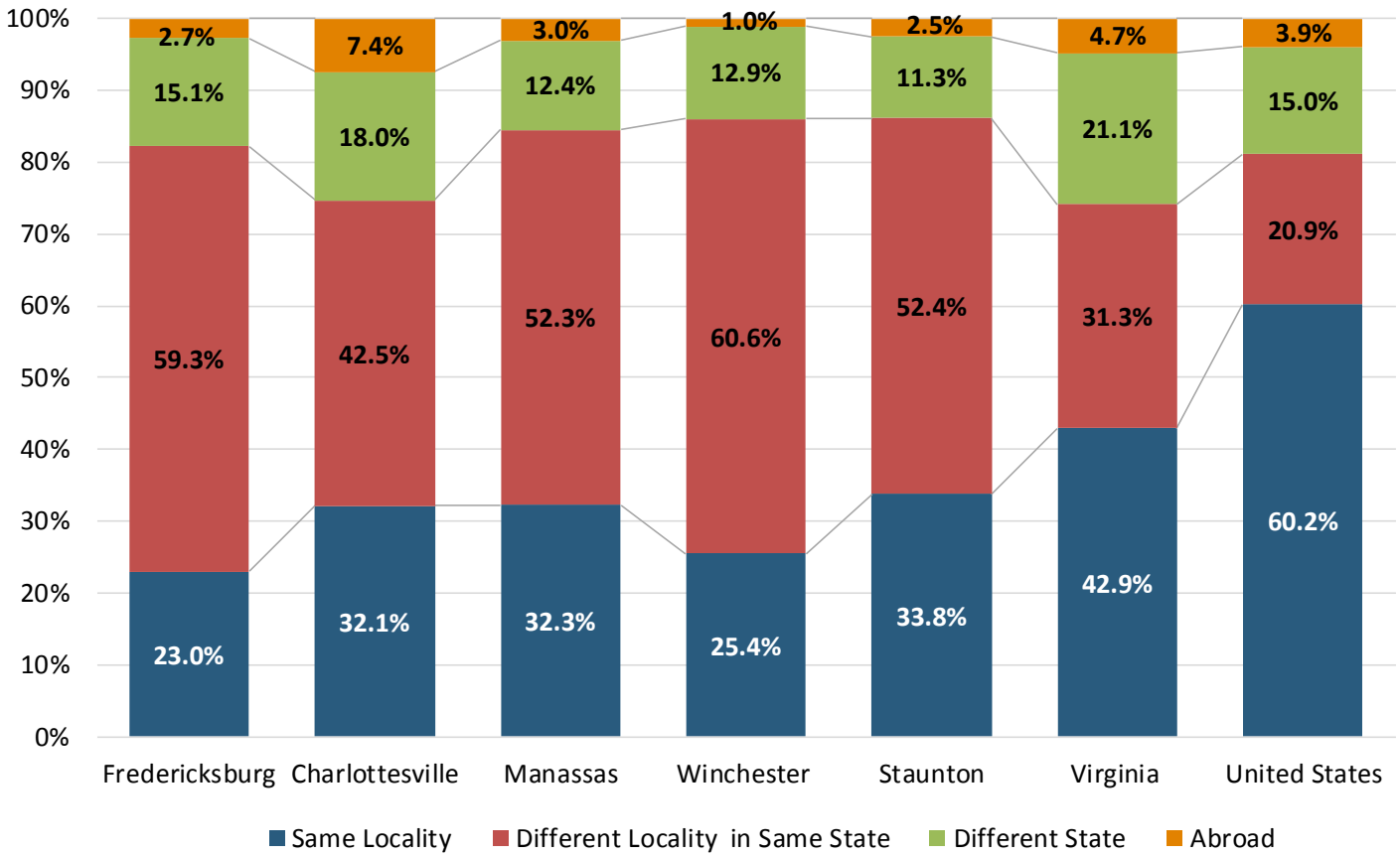
- Population and Growth
- Age
- Crime
- Educational Attainment
- Worker Flows

2006-2015 Population Change (%)



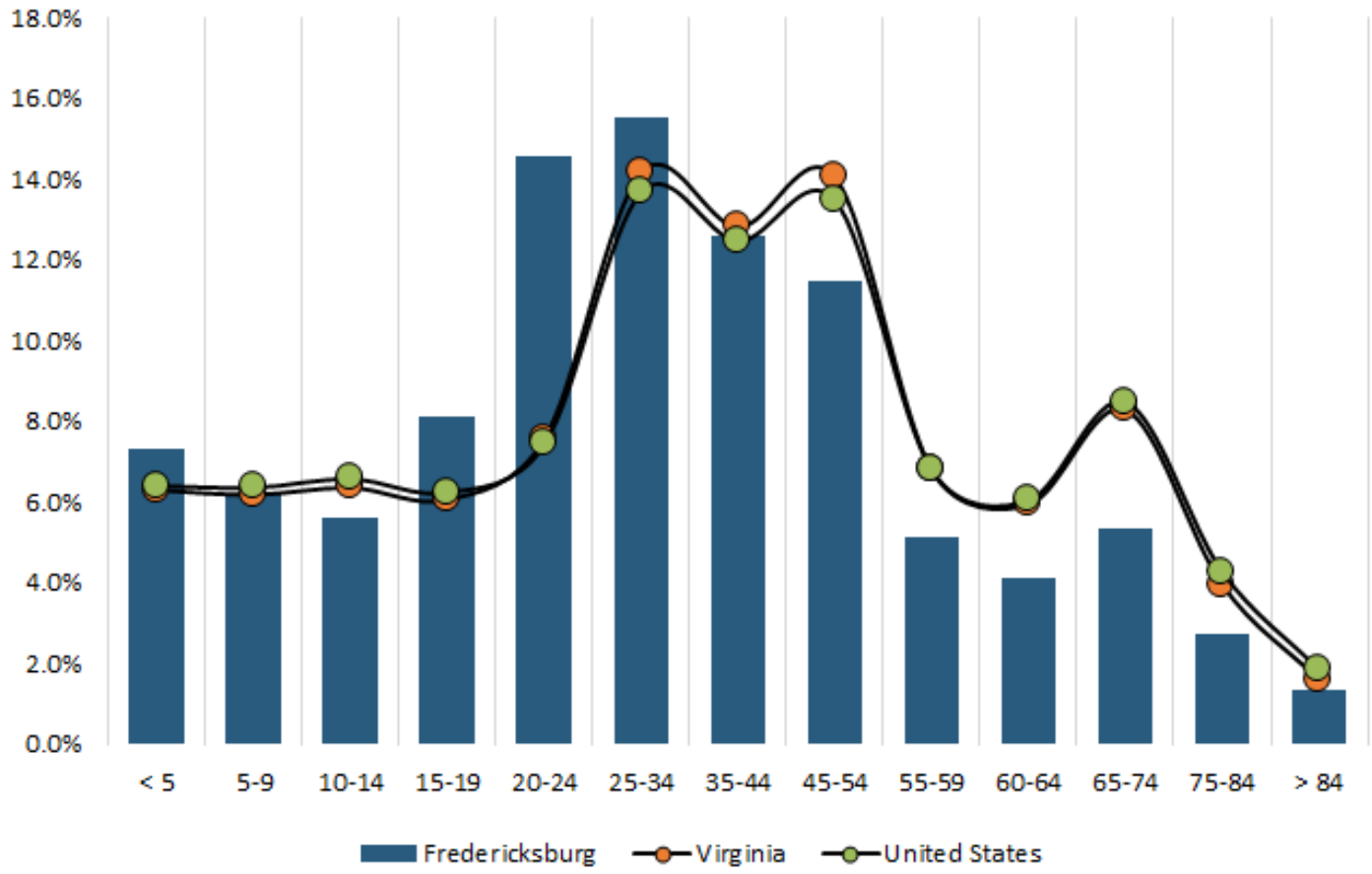
Source: US Census Bureau, Garner Economics

Previous Location of Residents That Had Moved Within Past Year



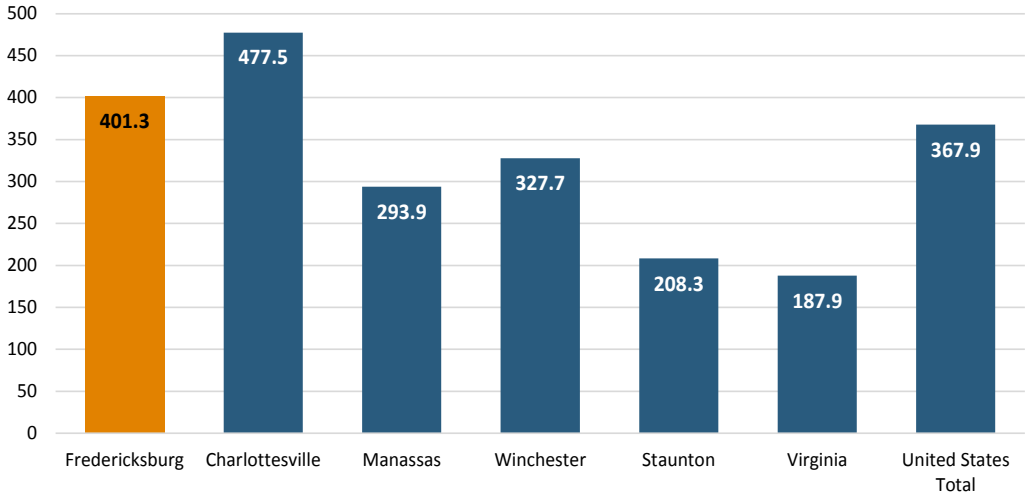
Source: US Census Bureau, American Community Survey 3-Year Estimates, Garner Economics

Age Groups by % of Population, 2015



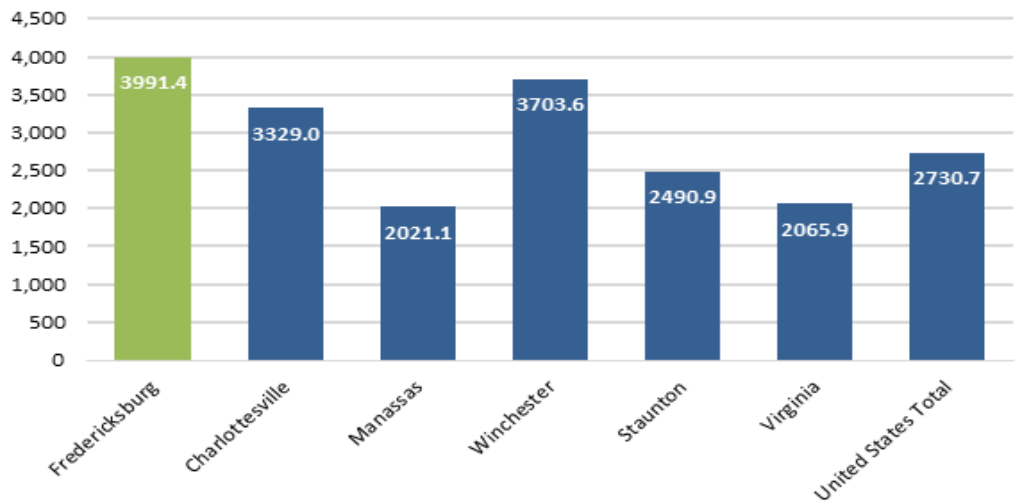
Source: US Census Bureau, American Community Survey 3-Year Estimates, Garner Economics

Crime Rates per 100,000 Residents



Violent Crime

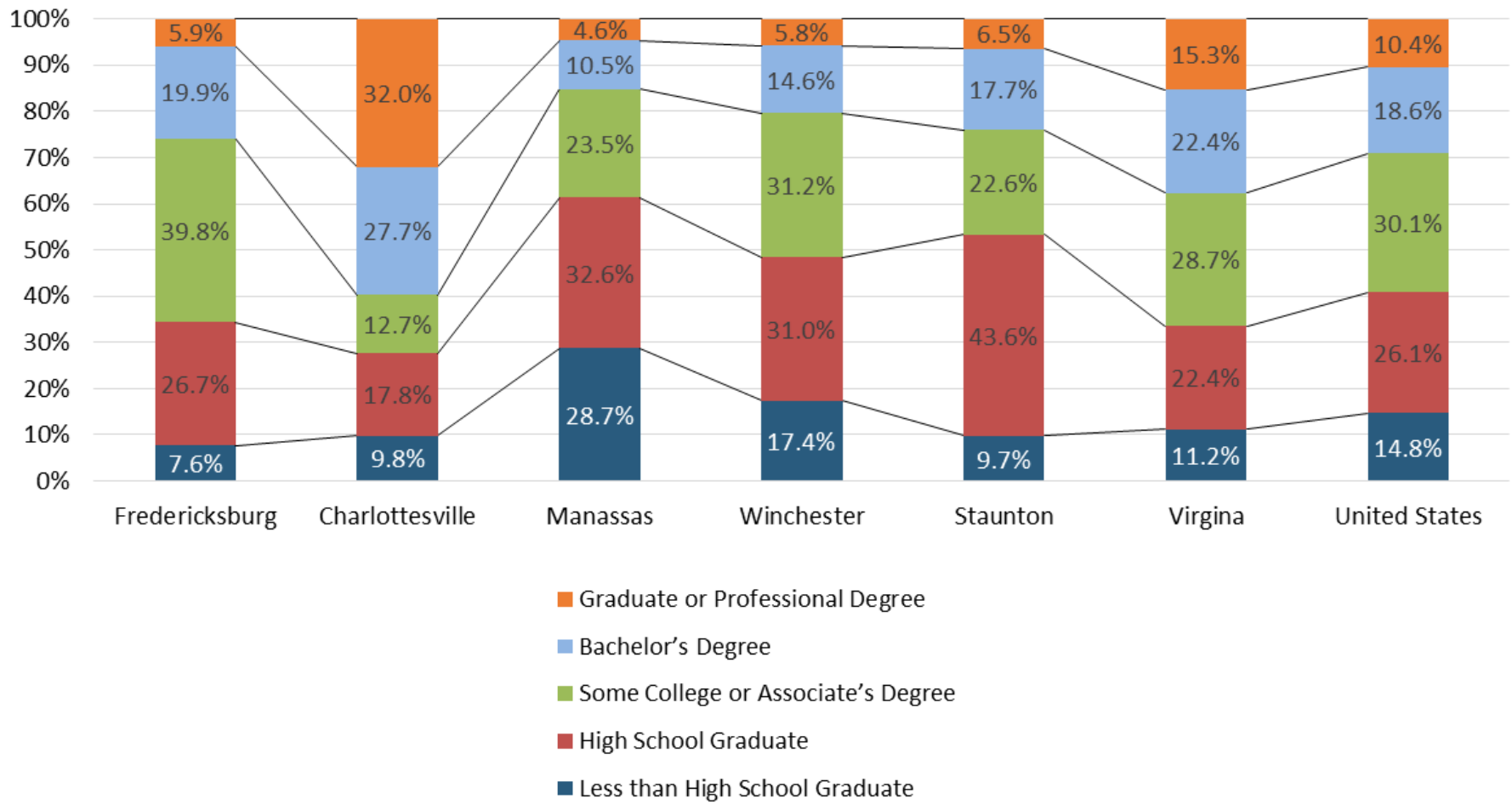
Property Crime



Source: FBI Uniform Crime Reports, Garner Economics

Educational Attainment

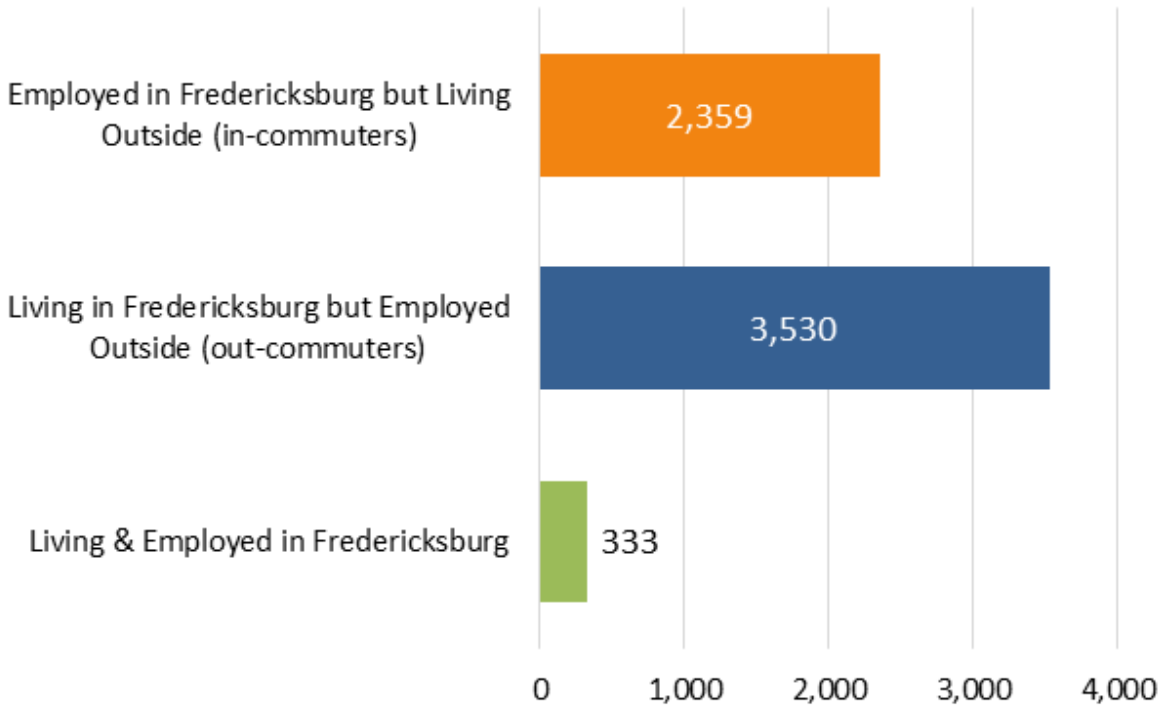
% of New Population Age 25+



Source: US Census Bureau, Garner Economics

Commuting Patterns

Changes in Worker Flows for Fredericksburg, 2003-2012
Primary Jobs Only

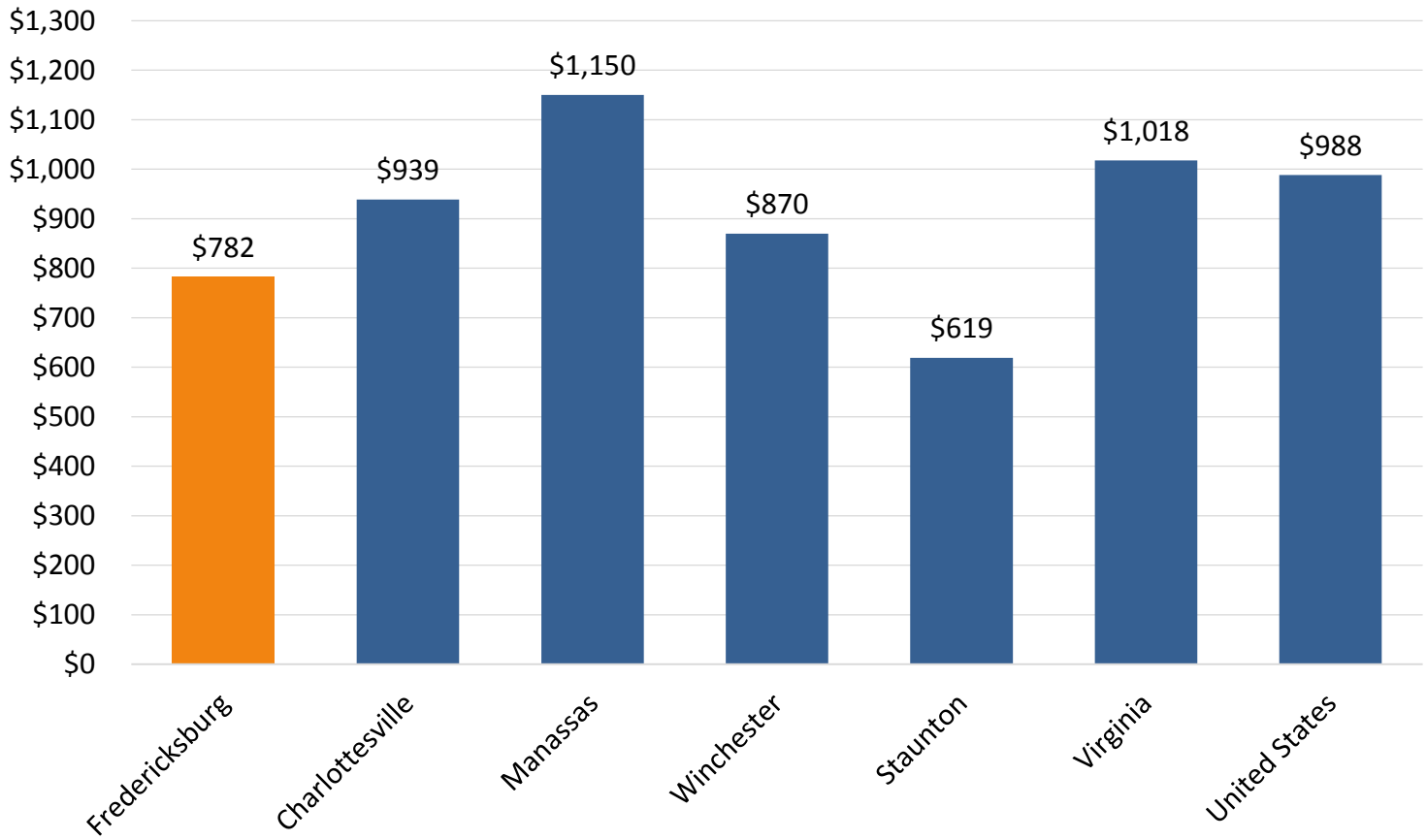


Source: US Census Bureau, Garner Economics

Economic Dynamics

- Wages
- Income
- Self-Employment
- Employment Trends
- Unemployment
- Retail Leakage
- Broadband Access

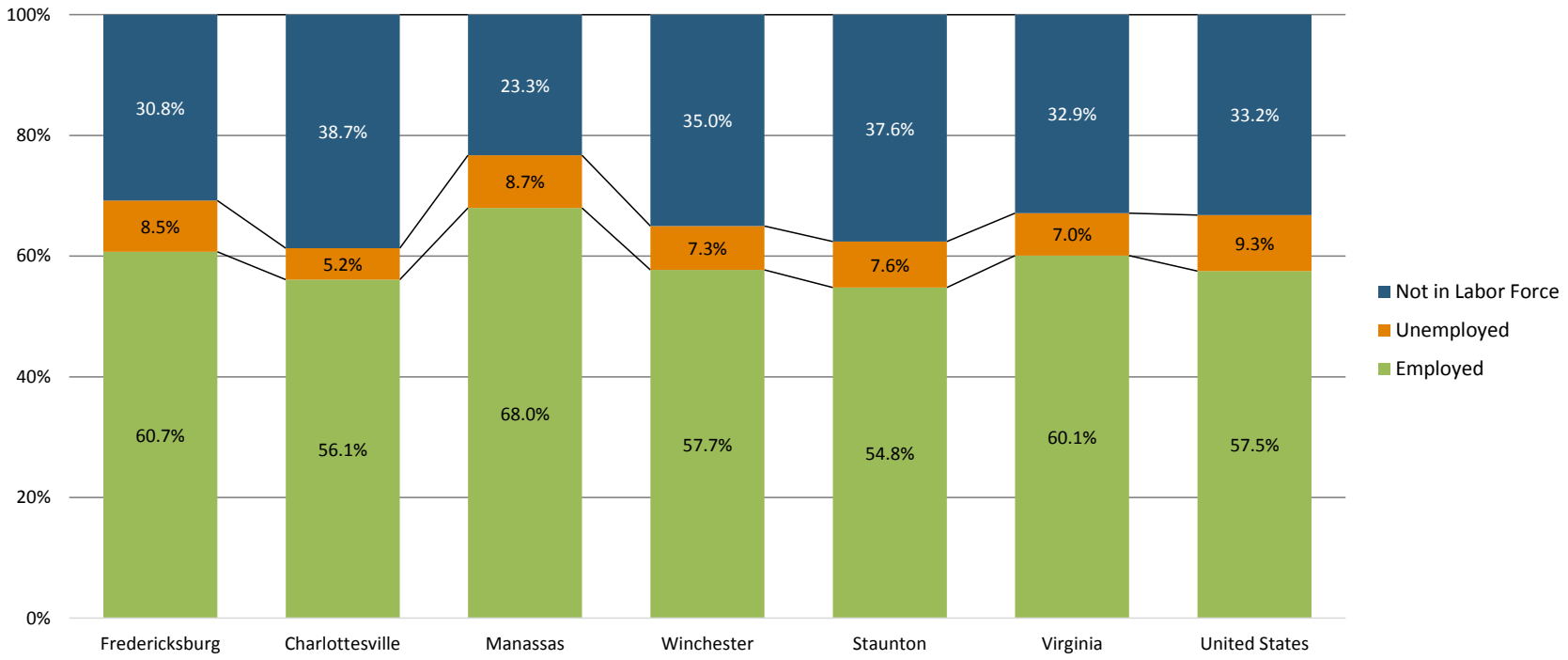
Average Weekly Wage, 2014



Source: Bureau of Labor Statistics, Garner Economics

Employment Status, 2013

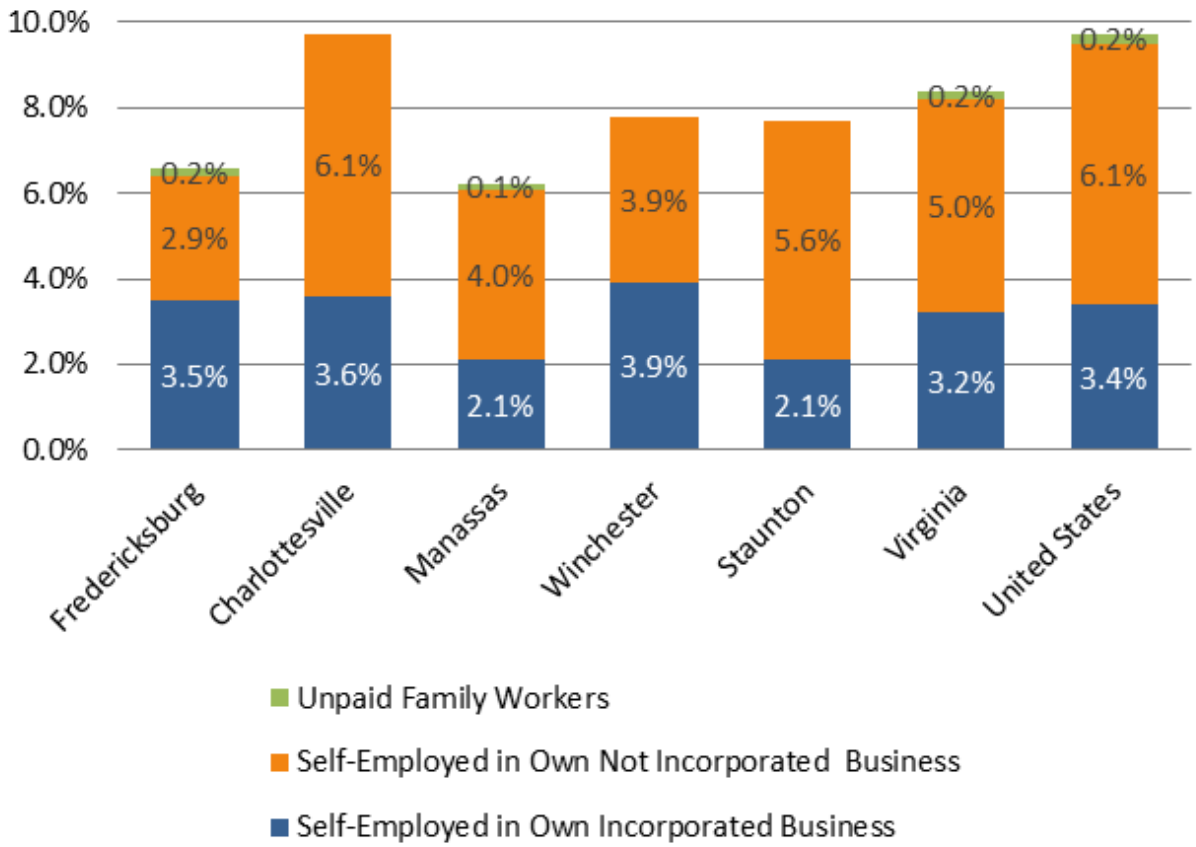
Population Age 16+



Source: US Census Bureau, Garner Economics, 3-Year Estimates 2011-2013

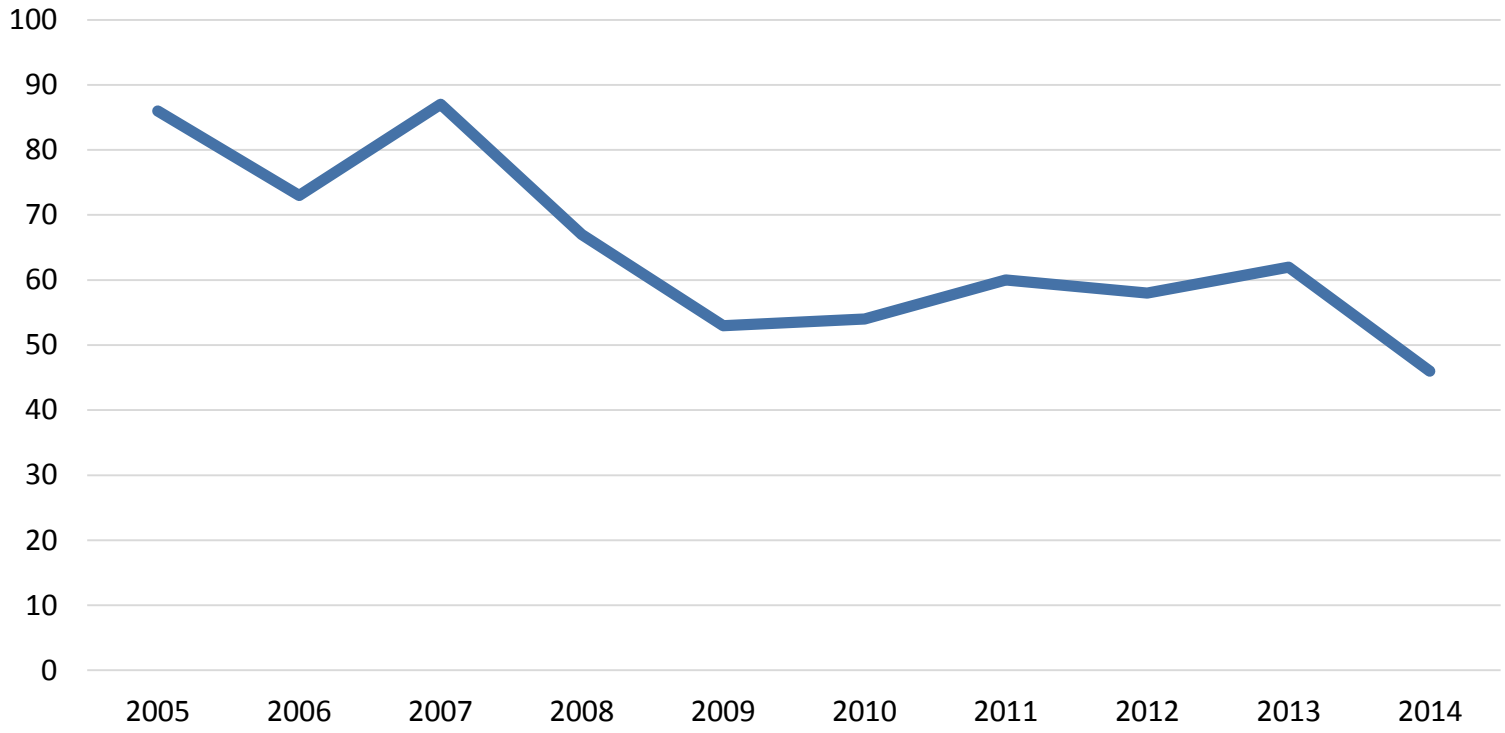
Self Employed Workers, 2013

As Share of Total Civilian Workers



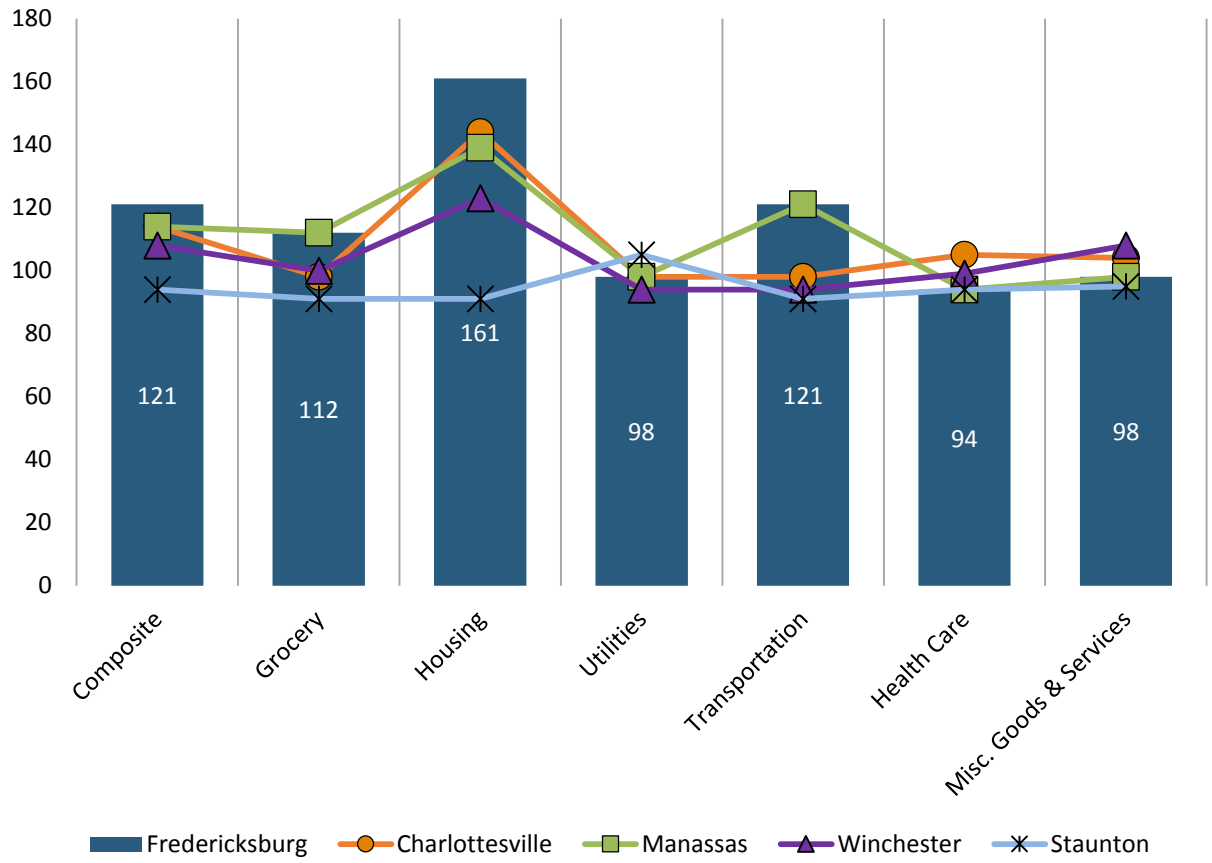
Source: US Census Bureau, Garner Economics, 2011-2013 3-Year Estimates

New Startup Firms in Fredericksburg



Source: Virginia Employment Commission, Garner Economics

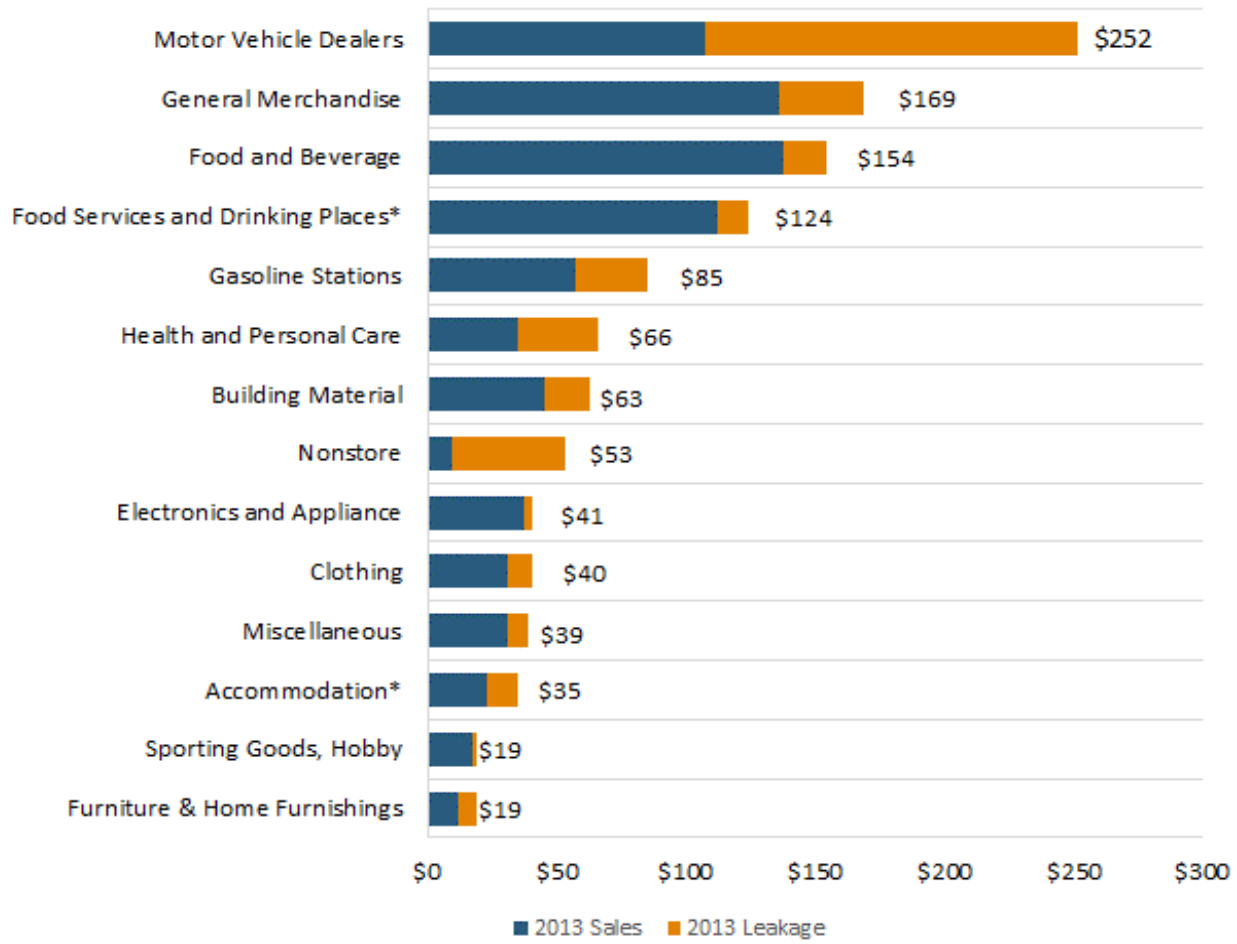
Cost of Living Index, 2014



Source: Areavibes.com, Garner Economics

Local Retail Sales and Leakage, 2013

(Millions of $)



** Industries belonging to NAICS 72: Accommodation and Food Services have been included as a convenience. Technically, these are not retail industries.*

Overall Leakage in Fredericksburg: 31%

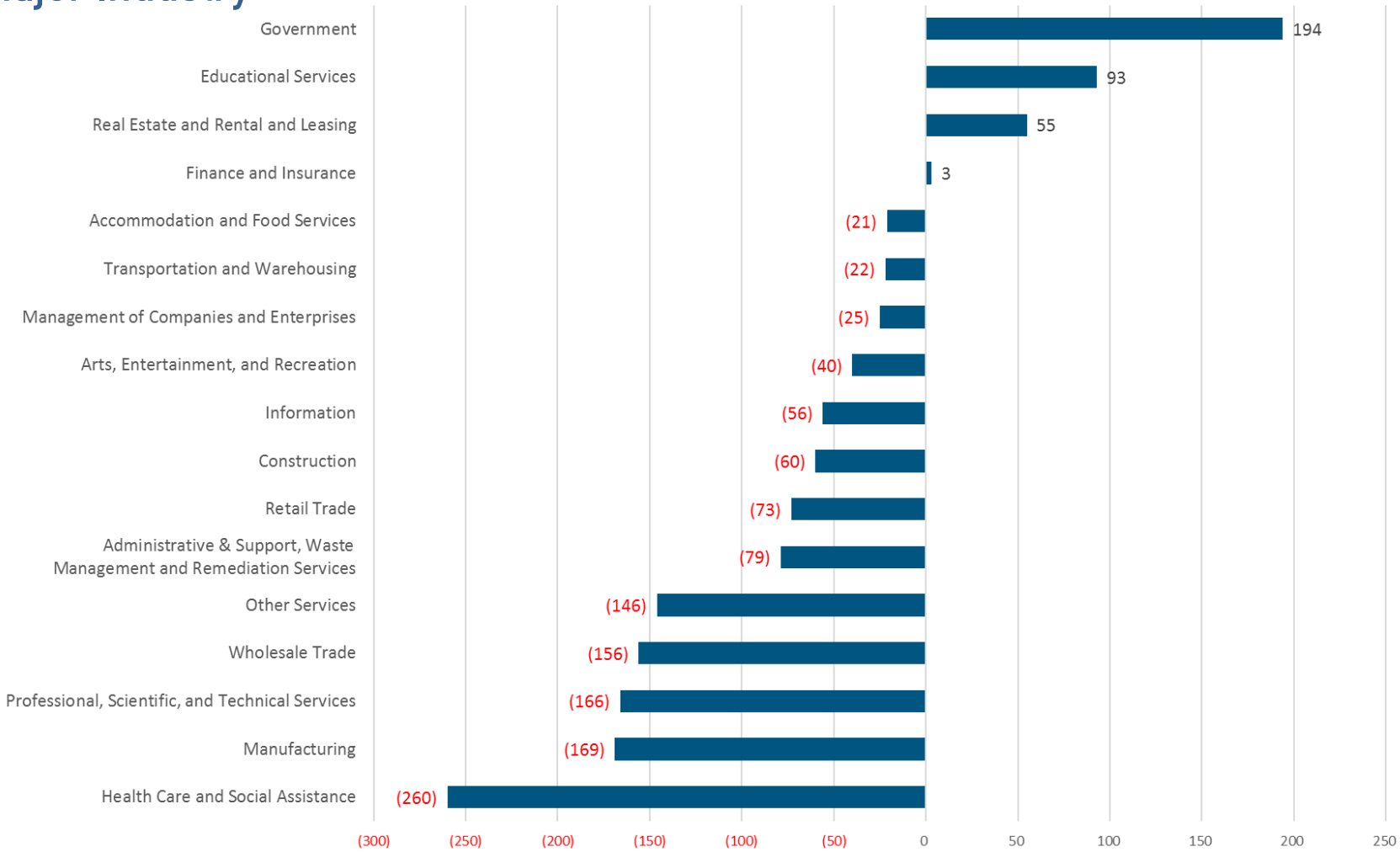
Source: EMSI, Garner Economics

Local Specialization, Competitiveness & Growth

- Industry Sector Change
- Industry Earnings
- Occupational Change
- Occupational Earnings
- Cluster Specialization & Growth
- Cluster Competitiveness
- Occupational Specialization & Growth

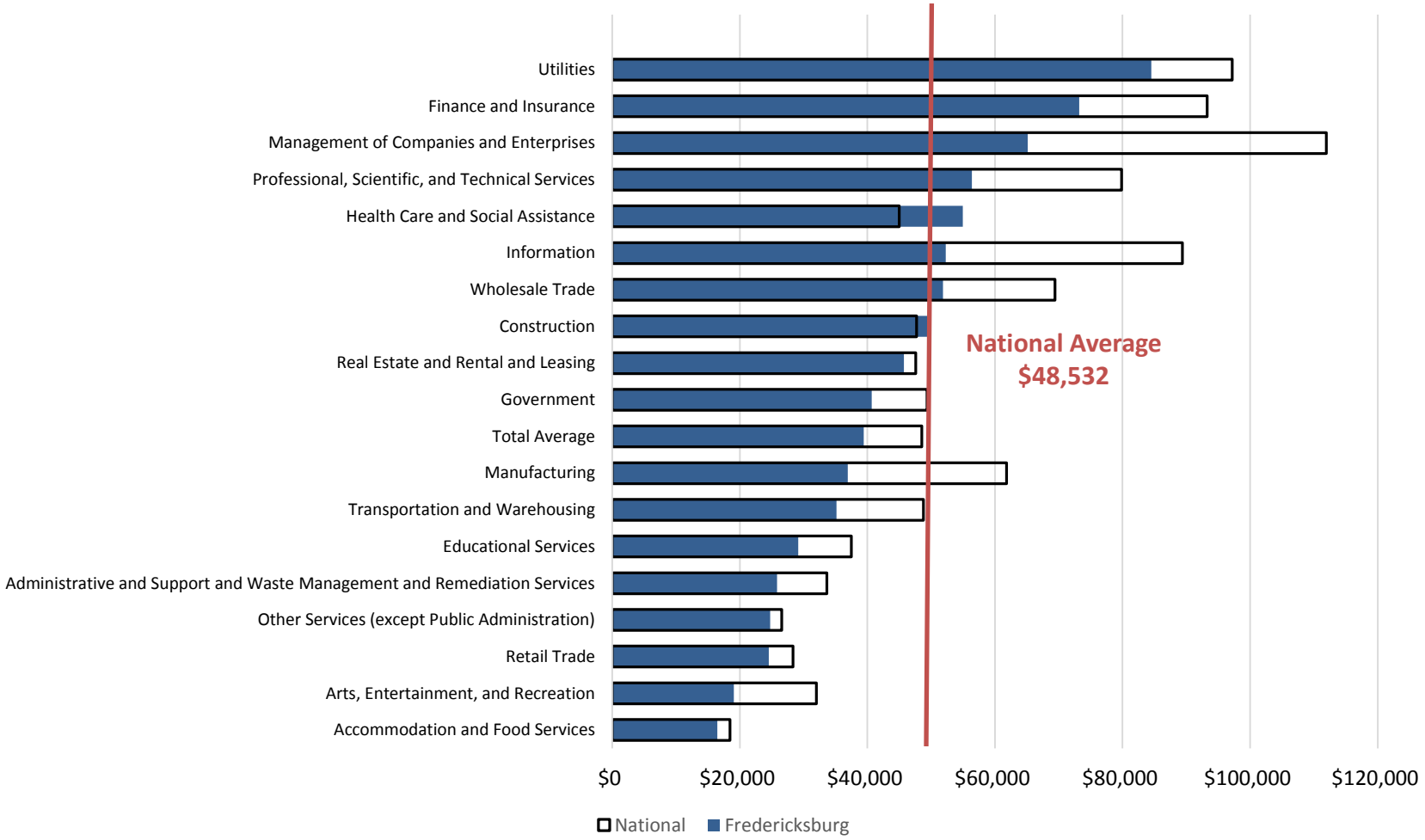
Five-Year Employment Change, 2010-2015

by Major Industry



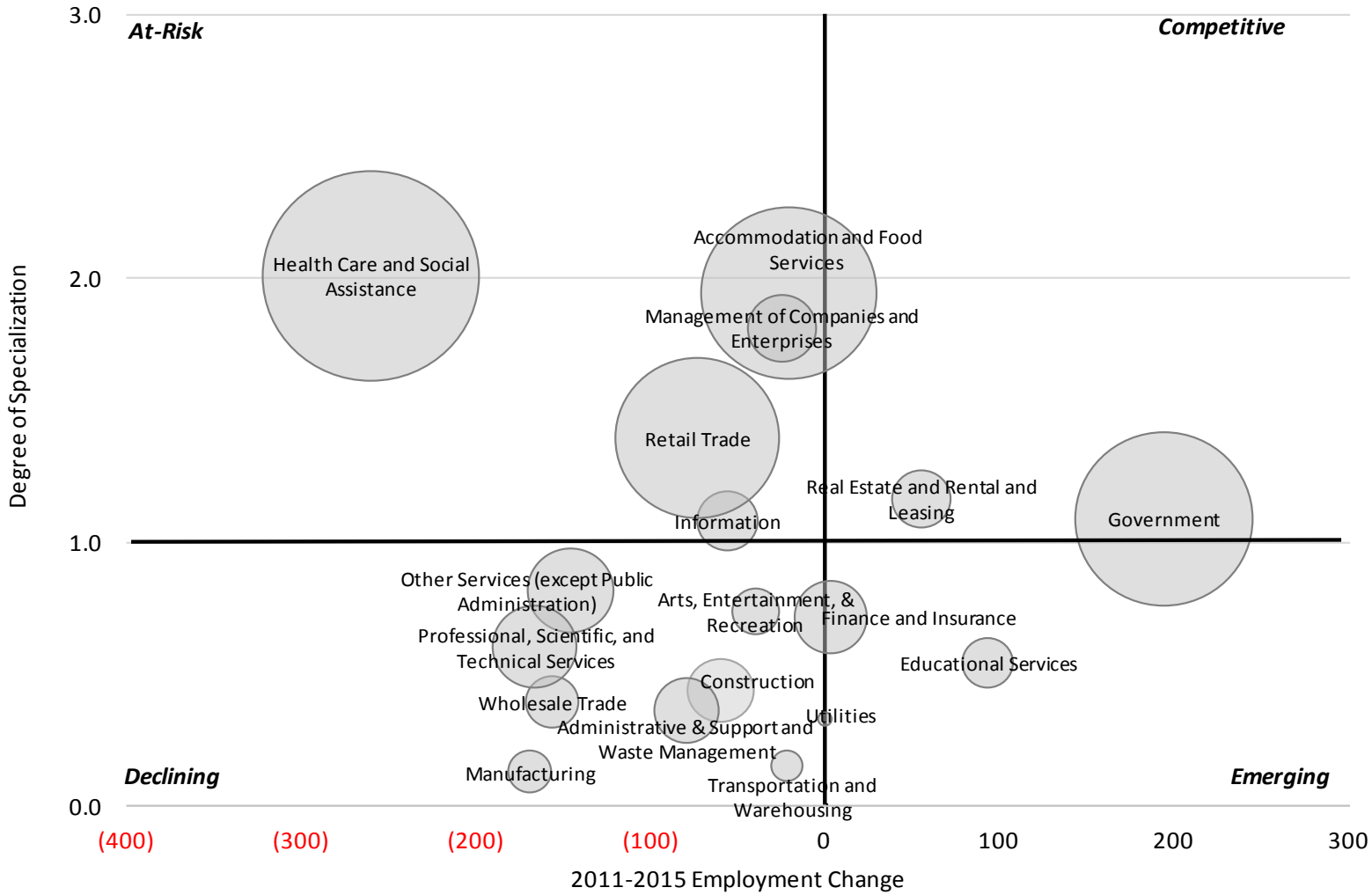
Source: EMSI Q2 2015, Garner Economics

Average Industry Earnings Comparison, 2015



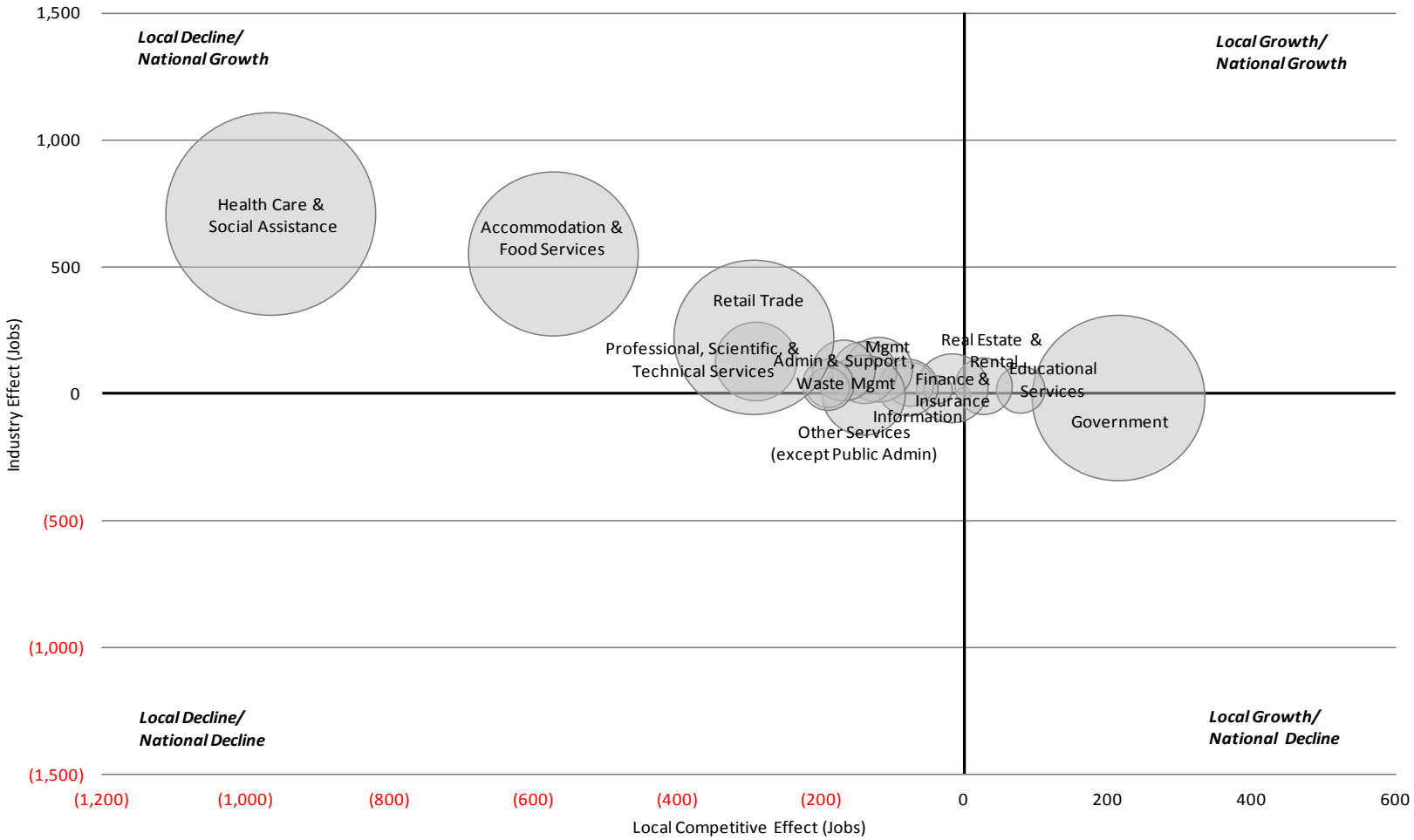
Source: EMSI Q2 2015, Garner Economics

Industry Specialization & Growth, 2010-2015



Source: EMSI Q2 2015, Garner Economics

Industry Relative Components of Growth, 2010-2015

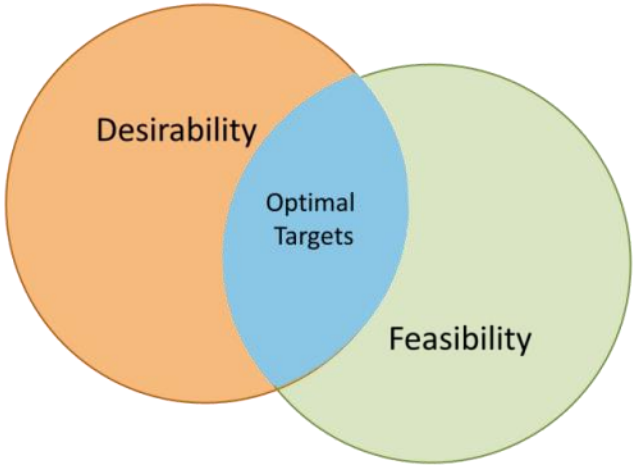


Source: EMSI Q2 2015, Garner Economics

Optimal Targets

Optimal Targets for Fredericksburg

- Based on the site-specific characteristics of Fredericksburg
- Four core industry targets chosen based on best match with unique competitive advantages in the area



Tourism, Hospitality and Specialty Retail	Science and Technology, R&D, Contracting, and Consulting	Professional and Corporate Office Users	Education and Health Services

Tourism, Hospitality, and Specialty Retail

Subsectors	Some Rationales
❖ Upscale Traveller Accommodations ❖ Restaurants and Other Dining Establishments ❖ Scenic and Sightseeing Transportation ❖ Specialty Food Stores ❖ Gift, Novelty, and Souvenir Stores ❖ Art Galleries and Studios ❖ Craft Breweries and Distilleries ❖ High-End Specialty Boutique Retail	• Established status as cultural tourism destination • Well preserved and active historic downtown • High rate of population growth in surrounding region • Existing mix of downtown and suburban retail • High rate of educational attainment and household income among regional population base • Existing specialization in Retail Trade and Accommodation and Food Services sectors • Opportunity to continue to retain retail spending in the local area • Opportunity to improve quality of hotels and lodging facilities in the local area • Target subsector 10-year growth rate of 10.4%

Science/Technology, R&D, Contracting, and Consulting

Subsectors	Some Rationales
❖ Architectural, Engineering, and Related Services ❖ Mgmt, Scientific, and Tech Consulting Services ❖ Scientific Research & Development Services ❖ Software Publishers ❖ Computer Systems Design and Services ❖ Data Processing, Hosting, and Related Services ❖ Facilities Support Services ❖ Cybersecurity ❖ Niche Process Light Manufacturing	• Centrally located for regional and national markets • High broadband speed for small businesses • Availability of technicians and scientists • Availability of office industrial space in local area • Proximity to Washington/Northern VA economy • High local rates of educational attainment and income • Strong wages in *Professional, Scientific, and Technical Services* sector • Emerging growth in *Life, Physical, and Social Science* occupations • Opportunity to leverage presence of retired military, government, and contractor personnel • Ability to attract/retain high wage earners who presently out-commute • Average target subsector national earnings of $96,600 • Target subsector 10-year growth rate of 20.2%

Professional & Corporate Office Users

Subsectors	Some Rationales
❖ Legal Services ❖ Accounting, Tax Prep, Bookkeeping, and Payroll Services ❖ Management of Companies and Enterprises ❖ Office Administrative Services ❖ Business Support Services ❖ Regional and Corporate Headquarters for Private and Not-for-Profit Institutions ❖ Association Management Headquarters	• Centrally located for regional, national, and int'l markets • Proximity to Washington/Northern VA economy • Availability of skilled clerical workers • High broadband speed for small businesses • Availability of office and industrial space • Presence of UMW and Germanna CC • Ability to attract/retain high wage earners who presently out-commute • High local rates of educational attainment and income • High concentration of jobs in *Management of Companies and Enterprises* sector • Average target subsector national earnings of $85,368 • Target subsector 10-year growth rate of 11.3% • Quality of place assets

Education & Health Services

Subsectors	Some Rationales
❖ Business Schools & Computer/Mgmt Training ❖ Educational Support Services ❖ Offices of Physicians, Dentists, and Other Health Practitioners ❖ Health Services Educational Institutions ❖ Outpatient Care Centers ❖ Medical and Diagnostic Laboratories ❖ Home Health Care Services ❖ Nursing and Residential Care Facilities	• Presence of Mary Washington Hospital • Presence of UMW and Germanna CC • Availability of skilled technicians and scientists • Availability of housing at all price points • Availability of adequate medical facilities • High rate of population and labor force growth • High local rates of educational attainment and income • High concentration of employment and strong wages in *Health Care* sector • Emerging growth in *Educational Services* sector • Strong growth in health care and education related occupations • Average target subsector national earnings of $58,271 • Target subsector 10-year growth rate of 23.5% • Quality of place assets

Recommendations

Recommendations Built on 3 Foundations:

1. **Holistic Approach**
   Undertake economic development activities in the context of work being done to strengthen not only the City, but also the entire region.

2. **Be a leader**
   The success of the strategy will depend not only on the changes the EDT makes, but also on its ability to be a leader within the City for making the case for such collaboration and change.

3. **Maintain division of responsibilities**
   Policymakers, such as the City Council, is to provide a business climate that nurtures and promotes effective, quality growth without being onerous for businesses of all sizes to operate profitably. It is the staff's responsibility to implement the policies adopted by the Council.

Recommendations in Three Categories

Enhance the Product	
Product improvement initiatives to ensure Fredericksburg is in a competitive position to attract, retain, and grow the types of companies and industries it desires	
Tell the Story	**Execute Effectively**
Product marketing actions for Fredericksburg to share the economic dynamism of the City with target prospects and talent	Organizational adjustments that allow the City of Fredericksburg to align its mission and focus on those areas that will directly impact the economic growth the community desires

Enhance the Product

Strategy:

Further develop assets and initiatives in key areas, such as talent and connectivity, which support the area's desire to attract and grow more high-quality economic activities in the City and to support the current and future residents of Fredericksburg.

Goal/Results:

Fredericksburg strengthens its quality of place and talent pipeline that attract and retain the region's most talented people and companies.

Enhance the Product

Actions

1. Create a Tourism Product Development Fund.
2. Update the JumpStart Plan of 2006 to document what has been accomplished, and what needs to be refined.
3. Create a Culinary Institute at Germanna Community College.

Enhance the Product

Actions

4. Provide the public free, high-speed Internet access in the Core Business District and in disadvantaged neighborhoods.
5. Create a "placemaking" plan to improve City gateways.
6. Conduct a market analysis to attract an upscale hotel Downtown.
7. Create a broad and actionable river master plan, including new venues.
8. Update the Desman Parking Study of 2006.

Execute Effectively

Strategy:

Build a focused economic development service delivery mechanism for existing and potential businesses in the City, and collaborate with other entities to work more seamlessly and present a unified brand to external clients.

Goal/Results:

The City is better able to attract the types of industries and talent that will make Fredericksburg even more competitive.

Execute Effectively

Actions

1. Staff a City business investment and retention ombudsman in the City manager's office.
2. Create a one-stop permitting office to streamline the permit process and create an internal culture of "yes."
3. Move the EDT's management and business promotion offices to a more corporate environment.

Execute Effectively

Actions

4. Conduct a third-party, unbiased review of the UDO.
5. Promote local entrepreneurship.
6. Keep tourism part of the organizational structure of the EDT.
7. Advocate for and develop a realistic and sustainable incentive policy for the City.

Tell the Story

Strategy:

Tell Fredericksburg's economic development story more effectively to a more targeted audience of potential companies and investors.

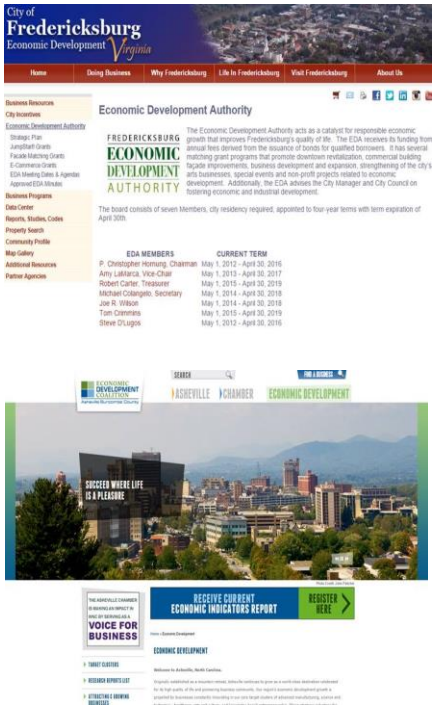
Goal/Results:

The City is better able to attract the types of companies that will leverage the City's many assets and increase the quantity and quality of economic opportunities for its citizens.

Tell the Story

Actions

1. Rebrand (or create) a Fredericksburg unified brand.
2. Execute a process for lead generation and business target profiling.
3. Actively solicit and provide information to site-location consultants.
4. Develop familiarization events for consultants and companies.
5. Enhance the EDT website to address the needs of potential investors.



What's Next?

Leadership in Fredericksburg will need to:

- Be more proactive and execute its economic development efforts differently
- Take the lead in proposing and attracting different types of activities
- Be a champion for long-term investments that will add to the City's product and quality of place
- Ensure that the correct level of personnel and attention is paid to the City's economic growth
- Undertake more proactive and outward-facing marketing and attraction efforts
- Create and encourage the development of the spaces and places for desired activities

Thank you!

This Master Plan has benefited greatly from the foundational work of City, and the professionalism and contributions of its staff. The many stakeholders who took part in the focus groups and surveys and provided opinion have been a valuable resource to this effort.

Special thanks to:

- Karen Hedelt, Bill Freehling, and Amy Peregoy
- All of the focus group and survey participants
- Mayor and City Council

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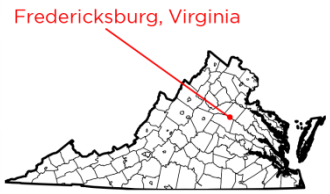
solutions that work



Questions?

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TO: Planning Commission
FROM: Erik F. Nelson, Senior Planner/Deputy Director
DATE: July 6, 2016
RE: **Small Area Comprehensive Plans**

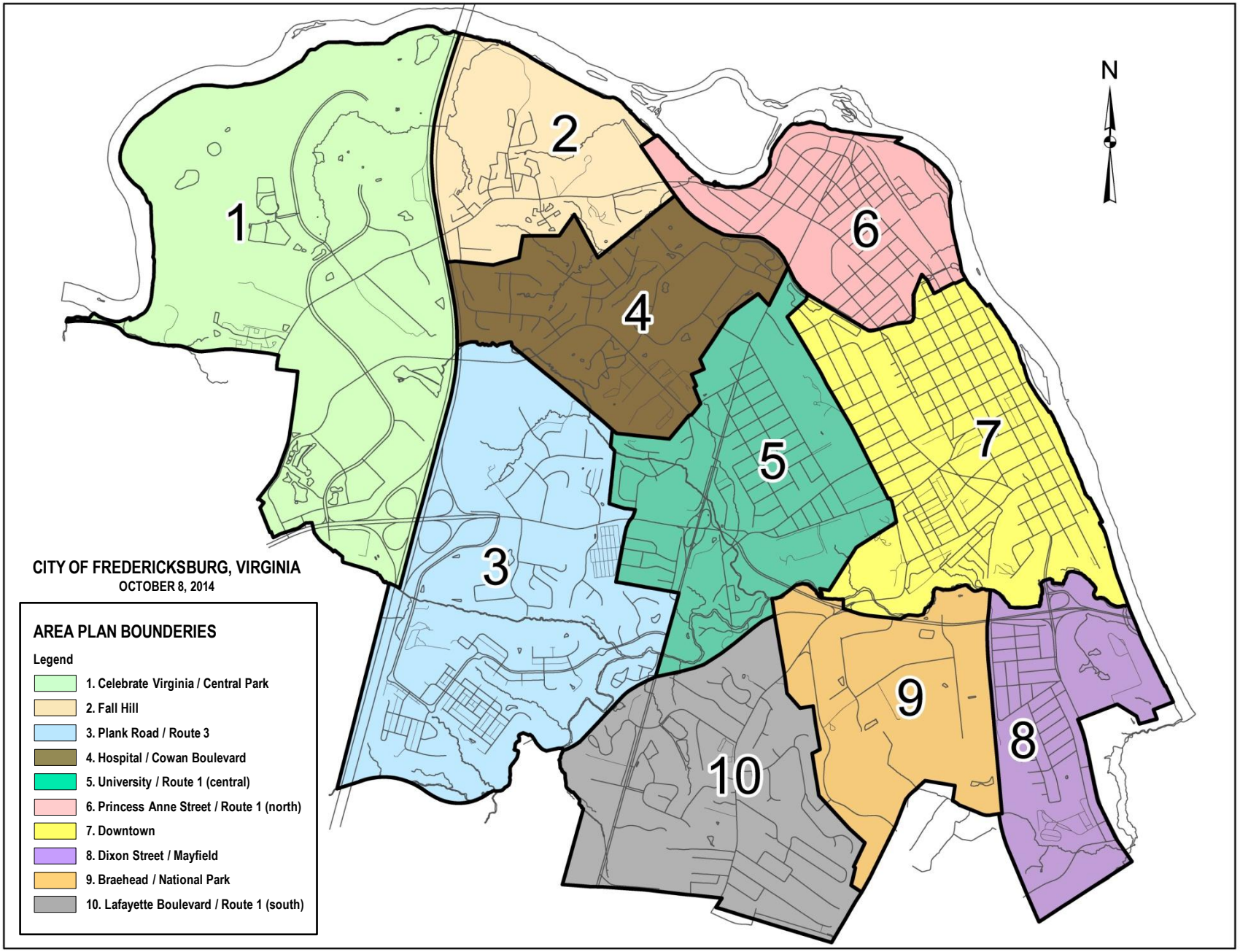
The Planning staff has begun work with a consulting firm called Streetsense, to develop two small area comprehensive plans. The new Comprehensive Plan (2015) divides the city into ten planning areas and we will be working on plans for Planning Areas 3 and 6. This process will extend through March of 2017 and will move along quickly.

There are three sets of neighborhood meetings scheduled, one in each area, as follows:

Area 3: July 19, September 19, November 15 - at James Monroe High School
Area 6: July 20, September 20, November 16 - at the Idlewild Community Center

Staff will also identify stakeholders and other interested persons who will be interviewed by the consulting team. The initial meeting is to gather information and the two subsequent meetings will be to present research info and the developing plans.

Although we anticipate Planning Commission interest and participation during this process, staff will need to take the finished plans through the Planning Commission and the City Council for formal adoption. In early 2017, as these two small area comprehensive plans are being completed, we anticipate beginning a new small area plan for the downtown area.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CITY OF FREDERICKSBURG, VIRGINIA
OCTOBER 8, 2014
AREA PLAN BOUNDERIES
Legend
1. Celebrate Virginia / Central Park
2. Fall Hill
3. Plank Road / Route 3
4. Hospital / Cowan Boulevard
5. University / Route 1 (central)
6. Princess Anne Street / Route 1 (north)
7. Downtown
8. Dixon Street / Mayfield
9. Braehead / National Park
10. Lafayette Boulevard / Route 1 (south)