Technical Assistance Panel

Laurel Hill

Lorton, Virginia
October 9 & 10, 2003

Sponsored By:
Fairfax County
Laurel Hill Adaptive Reuse Citizens Task Force
And
Department of Planning and Zoning
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ULI Washington is a district council of the Urban Land Institute, a nonprofit education and research institute supported by its 18,000 members worldwide. The preeminent, multidisciplinary real estate forum, ULI facilitates the open exchange of ideas, information, and experience among local, national, and international industry leaders and policy makers dedicated to creating better communities. ULI members who live in the Washington Region (1,125 total) are automatically members of the Washington District Council. They include developers, builders, property owners, investors, architects, public officials, planners, real estate brokers, appraisers, attorneys, engineers, financiers, academics, students and librarians.

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The objective of ULI Washington’s TAP program is to provide expert, multidisciplinary advice on land use and real estate issues facing public agencies and non-profit organizations in the Washington metropolitan area. Drawing from its extensive membership base, ULI Washington conducts one-day panels offering objective and responsible advice to local decision-makers on a wide variety of land use and real estate issues ranging from site-specific projects to public policy questions. The TAP program is intentionally flexible to provide a customized approach to specific land use and real estate issues.

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Acknowledgements

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The Panel

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Statement of the Problem and Questions for Panel

BACKGROUND

In July 2002, having completed its role as a correctional facility for the District of Columbia, the Lorton correctional complex was transferred to Fairfax County for reuse and redevelopment. The site, now known as Laurel Hill, consists of 1,600 acres of park land, locations for a high school, middle school, and elementary school, and land designated for adaptive reuse. The site contains over 300 buildings, of which 136 have historic significance. Significant progress has been made in the planning and the design for several tracts within the 1600 acre area and, in fact, clearing has begun for the new South County High School and the design of a county golf course is underway with financing for its construction already secured. Further, the County has engaged a partner, the Lorton Arts Foundation, to begin the planning and initiate rezoning consideration for the land area known as The Workhouse or Occoquan Facility which is the adaptive reuse area located along Route 123 (Ox Road).

In fall of 2002, the Fairfax County Board of Supervisors formed a Task Force to, among other things, help guide the Master Planning process for the adaptive reuse of areas within an 85-acre site containing 90 buildings. Over the past eight months the Laurel Hill Adaptive Reuse Task Force has developed a mission statement and set of principles for the reuse of this site given the County’s Comprehensive Plan and conditions placed on the site with its transfer from the Federal Government. A copy of the Mission Statement and principles are attached.

ISSUE

The Task Force is now increasing its focus on the approximately 85-acre land area containing the areas of the Lorton Reformatory and the Penitentiary. While the Task Force has solicited public input and collected numerous proposals outlining a myriad of uses for this area, there is a strong sentiment that additional information and ideas are needed to appropriately plan the adaptive reuse of this area. Community interest in the outcome of this property is high, and strong expectations exist for creating an asset that best integrates the historic assets of the site with community desires and market realities. In this regard, the assistance of the Urban Land Institute (ULI) was sought with respect to bringing to the forum expertise which will assist the Task Force in its thinking about the site’s possible uses and in developing alternative concepts for the site’s use which would be grounded in fiscal and market reality, and which would be complimentary to other uses in the vicinity. Further, it is envisioned that a ULI Panel would have the capacity to suggest ways in which the County could proceed to implement one or more concepts as members of the panel may have expertise in adaptive reuse projects which may be similar to this opportunity/challenge.

Moving forward, the County, the Task Force, and community will have to reach an agreement on a concept or series of concepts that result in the best use for this area, along
with a viable implementation process for the final plan. It is felt that a panel of objective experts from the ULI, with both local and national experience on similar projects, would bring a fresh perspective to the process. To that end, the panel had two main objectives: 1) to evaluate potential reuse options for the land and buildings and recommend an overall reuse scenario(s), and 2) to recommend a process by which the County should move forward to implement concept(s) for the adaptive reuse of the Lorton Reformatory. To achieve this, the panel was charged with answering the questions below.

**QUESTIONS**

1. Taking into consideration surrounding, approved and proposed land uses as well as market conditions, what challenges and opportunities exist for the preservation and reuse of the 85-acre site?

   A) What observations does the panel have about the use of the property to affect synergy and compatibility with use decisions already made for Laurel Hill?

   *This consideration could result in several recommended concepts regarding alternative uses to be incorporated into this site.*

   B) What observations does the panel have about the use of the property to effect synergy and compatibility with use decisions already made for Laurel Hill, assuming the Comprehensive Plan may be amended?

2. Given the County’s limited ability to participate in financing the improvements to this site, what are the possible financial resources or partnerships for the County to consider in making concept(s) become reality?

   A) Provide examples/best practices for how the County might solicit, structure, and manage an effective partnership(s) to redevelop the property? Specifically propose minimal requirements of potential users of the site to assure performance?

3. What implementation strategies would be recommended for the redevelopment of this site, including next steps and roles and responsibilities?
Panel Recommendations

The Urban Land Institute’s Washington District Council convened a Technical Assistance Panel (the “Panel”) sponsored by Fairfax County (the “County”) and the Laurel Hill Adaptive Reuse Citizens Task Force (the “Citizens Task Force”) to assist in the redevelopment of an 85-acre portion of the former Lorton Correctional Facility known as the Central/Maximum Facility at Laurel Hill (the “site”). On October 9 and 10, a panel comprised of ten experts in various aspects of land use and real estate development met to tour the site and recommend a plan for its reuse.

The panel used three guiding principals to evaluate the highest and best use for the site: 1) the site must integrate and, if possible, enhance surrounding land uses; 2) redevelopment of the site must result in a high quality project that retains critical historical elements and serves as an asset for the surrounding community; and 3) the site must be financially self-sufficient. The panel concluded that there was not likely one single viable use, unless a single corporate or educational user could be identified. The panel considered a full range of potential uses and agreed upon a mixed-use village center concept incorporating residential, retail and small portions of professional office space. Historic preservation issues, infrastructure constraints, and financial and market realities were given serious consideration prior to reaching this decision. The panel felt the village center concept provided adaptive reuse opportunities for the existing buildings, amenities and connections to the surrounding communities, and revenue potential to offset the negative value of the land and buildings in their current condition. The panel concluded by recommending a concept and action for implementation.

HISTORIC PRESERVATION

Preservation and retention of key historic elements represent the most significant challenge for the adaptive reuse of this site. The Lorton Correctional Facility was constructed primarily during the first half of the 20th Century. The arrangement of buildings around a central open lawn and the buildings constructed during the first half of the 20th Century are contributing elements to the National Register-eligible historic district. In addition, the 85-acre site includes the historically significant 18th Century Laurel Hill house, which would need to be considered in the overall use of the site. Principle physical restrictions presented by the historic site include the massive penitentiary enclosure wall and the narrow dormitory buildings of the reformatory. The panel determined that some compromise of the historic fabric, including the demolition of less significant buildings, the partial demolition of historic fabric, and historically
sensitive additions guided by the Secretary of Interior’s Standards for Rehabilitation, would facilitate the implementation of an economically viable use.

**INFRASTRUCTURE**
The panel determined that certain infrastructure needs would likely have to be addressed regardless of use on the site. The most important infrastructure need recommended was a new access road into the heart of the site from existing Silverbrook Road. This is desirable since access via the two existing ingress/egress options for the 85-acres were constrained. The Silverbrook Road access would terminate in a cul-de-sac directly adjacent to the historic wall surrounding the penitentiary, and the Lorton Road access lacks visibility. Because this new road would be crossing a stream, environmental considerations (wetland mitigation, resource protection area, and environmental quality corridor) must be taken into account.

Multiple and adequate water and sewer connection points should be provided to the site from the adjoining age-restricted residential community being developed by Pulte. The location of the sanitary sewer pump station being installed by Pulte should be evaluated to ensure that it is located low enough in elevation to service the proposed development on the 85-acre Laurel Hill site. With regard to the Pulte Spring Hill Active Adult and Senior Community, the panel felt strongly that the proposed fencing surrounding that development be removed or modified to facilitate pedestrian and vehicular integration with the 85-acre site.

The possible need to re-grade the entire site and install on-site drainage facilities due to poor drainage was raised by the panel. While a dramatic change in grade needed was not likely, this could be one of the more costly infrastructure needs given the comprehensive nature of the undertaking.

Finally, the panel recommended the expansion of Silverbrook Road be reconsidered to include traffic calming elements and a median to lend a more ceremonial feel to this road. These treatments would respect the historic importance of the areas as well as acknowledge and integrate the residential and educational uses planned for the site to enhance this location as the village center and to draw community together.

**POTENTIAL LAND USES**
The panel considered a range of potential mixed and singular uses for the property and weighed the risks and opportunities associated with each of these options. Following are a series of alternatives discussed by the panel:
• **Town Center Concept**—The geometry of the site and its central location within Lorton was seen as an opportunity to create a town center concept with a mix of large-scale retail, residential and commercial uses. The panel rejected this idea on the basis that: 1) the site does not offer the visibility required of larger scale retail due to limited access and necessary retention of the historic penitentiary wall, 2) given current retail development in the area (particularly the new mall across Interstate 95), insufficient market demand would exist for larger-scale retail on the Laurel Hill site, and 3) the town center concept would represent a high risk option for the site.

• **Conference Center, Hotel or Spa**—Given the unique characteristics of the site and its buildings, the panel explored opportunities to develop a single-use conference center, hotel or spa on the site. This idea was rejected on the basis that: 1) existing and planned projects of this nature in the Washington Metropolitan area (Montgomery County as an example) are having limited success, and 2) as a destination, Lorton was deemed as not having the draw required to attract regional or out-of-town visitors to the site.

• **Educational, Institutional, or Corporate Campus**—The panel agreed that the campus environment of the site and its historic buildings posed a natural opportunity for an educational, institutional or corporate user, however they recognized that such an entity would be difficult to find given the high cost of adaptively reusing the buildings. Should the opportunity arise to locate a sole educational, institutional, or corporate user on the site, it may warrant consideration by the County. Absent an immediate opportunity, the panel strongly believes alternative strategies must be pursued to offset the risks and continued costs of leaving the site vacant.

• **Residential**—The panel explored multiple options related to single residential uses for the entire site. Consideration was given to expanding adult, active, and extended care residential product on the 85-acre Laurel Hill site, which is adjacent to Pulte’s adult living project. The panel determined that this use would not maximize the potential of the site given: 1) these communities do not generally bare short- or medium-term financial results, and the added costs of this site would create a greater challenge in this regard, and 2) the surrounding community would reap minimum benefit from this use due to limited spending capacity of the residents and the “isolated” nature of these communities.

The panel recognized that converting the entire site to market-rate residential uses would result in the highest financial return for the County, however it was deemed that this would not be the responsible approach due to the historic nature of the site and its potential to create a gathering place for local residents.

• **Museum or Civic Use**—While there may have been an opportunity to locate a museum on the site to illustrate the history of incarceration and reform, the panel rejected this idea on the basis that: 1) a new museum focused on this topic is being formed nearby, 2) it is highly unlikely that a non-profit organization would have the substantial funds required to redevelop and maintain such a use, and 3) the nature of
the museum and location of the site would not be strong enough to attract sufficient regional and out-of-town visitors.

RECOMMENDED LAND USES
Because no single use was deemed viable for the site, the panel divided the 85-acres into three usable areas, which were 1) Penitentiary, 2) Reformatory Area, and 3) Baseball Field Area and addressed uses for each in turn. The panel incorporated market feasibility and design elements into the use analysis and attempted to ensure that the three separate areas were integrated and balanced with one another.

- **Penitentiary (the “Yard”)**--The Penitentiary or “Yard,” as it was called consisted of several cellblocks and a large cafeteria building. The Yard is demarcated by the surrounding historic wall which has a single gated access point at the southwest corner. Each of the four corners of the Yard has a guard tower. These are defining architectural elements of the site. A open lawn extends south of the cafeteria and is flanked on both sides by the cell-blocks.

The panel concluded that market-rate residential housing would be the best use for the Yard area. This would include adaptive reuse of existing buildings and new, stick-built infill construction of additional buildings of up to four stories. The adaptive reuse would require alteration of the existing cell-blocks, which could be converted into two-story loft-style residences, while the new housing would likely be more traditional apartment or condominium units. Architectural styles of the new construction should complement the existing penitentiary buildings that will be reused.

Limited demolition of a portion of the north and south sides of the existing historic wall was recommended to provide ingress and egress to the site. The main entrance to this area should be established at the intersection of Silverbrook Road and the Laurel Hill Greenway, a hiker–biker trail. It was recommended that some sort of traffic calming at this intersection should be considered to promote connectivity between the Yard and the Pulte Laurel Hill Community across Silverbrook Road. A road from the existing cul-de-sac off of Silverbrook Road should be extended through the northern wall into the Yard (see appendix, Design Concepts A and B).

The panel recommended demolition of the existing rear (north) portion of the cafeteria building and replacement with new construction with a “civic” look to provide an inviting entrance to the Yard. A second green lawn area would be established by flanking the open area between the wall and the back of the cafeteria with two new buildings. Parking would be established between the proposed new
buildings and the side walls. The vehicular ingress and egress would serve residents only and not be designed as a throughway. Drop-offs and pull-outs would also be provided in the design. Interior roads would be designed so as to not detract from the proposed lawn areas, which would serve as major design elements for the Yard. Two additional residential buildings would be placed south of the cellblocks with a similar parking configuration as the buildings north of the cafeteria. These buildings would help define the extension of the main quad through the southern portion of the wall and integrate it with the remainder of the site.

The panel felt there exists an opportunity to incorporate housing on the site to take advantage of local demand, offset the negative value associated with the site and its buildings, and create the critical mass necessary to support small-scale retail and commercial development. The historic nature of the buildings and wall, along with the desire to maintain open public spaces places significant constraints on the type and amount of housing and parking.

A back-of-the-envelope analysis suggested that 225 dwellings would be possible for the Yard area. This includes 140 new building units and 85 two-story units in the existing cell blocks. This would allow the cafeteria to serve as a large common area for the residents. Up to 35 new townhomes should be considered outside the eastern wall area. The panel also considered the viability of exempting a portion of a cellblock area from reuse and retaining it in its current historical condition as a historic preservation element. The main issues identified with reusing the Yard area as proposed include the historic wall penetration, protecting a cell area, traffic circulation/parking/drop-off points, and lighting limitations due to existing windows, which would likely need to be preserved in accordance with the Secretary of Interior’s Standards for Rehabilitation.

- **Reformatory Area**
  The panel commented that the Reformatory area was a natural campus driven by its orientation around an open lawn. The lawn is defined by dormitory-style housing on the north and south ends and a cafeteria and administration building on its east and west ends, respectively. Additionally, the Reformatory had a series of individual buildings east of the cafeteria, which helped define its relationship to the Baseball Field Area and the Yard. The area between the ancillary buildings and the cafeteria contained a brick patio, which could make an excellent hard-surfaced public square.

  The panel concluded that the best use for this area would be additional market-rate residential housing, except in the event that a single-user, such as an educational facility (e.g. prep school, suburban satellite university campus) or corporate entity, could be identified. The panel did note however that to secure such a user may require a
combination of extraordinary effort and time. The panel believed approximately 150 units would be possible by adaptively reusing the dormitories. New townhouse development was recommended for the area south of the dormitories. Parking would be provided between the dormitories and the proposed townhouses. Although considered a contributing building to the historic district, the administration building, constructed in 1952, has been compromised due to recent renovation of the building following its gutting due to fire. For this reason, it should be considered for demolition. Major areas of discussion related to the Reformatory included the possible enlargement of the narrow dormitory buildings through historically sensitive additions guided by the Secretary of Interior’s Standards for Rehabilitation to facilitate reuse and the lack of parking on the northern side due to the proximity of the dormitories to the property line.

- **Baseball Field Area**
  The panel determined that the historic Baseball Field area provided an opportunity for commercial development necessary to offset the high cost of redeveloping the rest of the property. New construction and reuse of the ancillary structures from the Reformatory area would be used to create a village center concept with a “Main Street” feel. The baseball field and bleachers are considered contributing elements to the historic district. However, the sacrifice of the baseball field affords the only opportunity on the site feasible, from a historic preservation perspective, for new construction capable of generating critical mass to sustain the remainder of the site, and the presence of several baseball fields in the Laurel Hill development was determined sufficient to offset the loss of recreational facilities in this area.

  The village center would be approximately 140,000 square feet. 60,000 square feet of development would occur in reuse of the stand-alone Reformatory structures. Possible uses here include restaurants and boutique shops. The new construction, which includes parking, is proposed on the ball field area and would consist of a 40,000 square foot grocery store, in addition to 40,000 square feet of additional neighborhood-oriented retail/professional office space, up to two stories—the second floor being office space (second story retail is very difficult to lease).

  The panel concluded that the key to the functionality of the village center was the new access road from Silverbrook Road into the heart of the development. The road would successfully integrate the commercial space with the residential areas proposed within and adjoining the 85-acre site. The road would be designed to enter the ball field site from the east (refer to appendix, Design A and B). The first intersection would be from the north, which would enable access to the townhouses proposed for outside of the Penitentiary Yard area. The new access road would generally define the southern edge to the development area on the 85- acre site and would separate all of the new and reuse development from the historic Laurel Hill house. The new road
would travel west to the end of the Reformatory area, turn north and then east and parallel the Greenway for a short distance before connecting to the adjoining senior’s housing street grid, if feasible. The main intersection of the new road would be with the “Main Street”, which would be the access point to the village center. The Main Street would bisect the stand-alone Reformatory structures and the new development to occur on the ball field. The major determinant in the amount of feasible commercial space is parking, which will be provided between the back of the new commercial areas and the new access road. The new road will also connect with the existing Lorton Road entrance to the site. The Lorton Road entrance provides residents with an attractive ingress/egress option through park land.

The panel further proposed that because of its high level of historic significance, the Laurel Hill house be restored as part of the redevelopment plan, and that care of the house subsequently revert to the Northern Virginia Regional Park Authority (NVRPA). The location of the house southeast of the principle maximum-security facility and surrounded by park land provides an ideal opportunity for such treatment. It was proposed that the house be sufficiently buffered from any new construction, including roadways, and that the property immediately surrounding the house be maintained as a cleared, grassy yard surrounded by dense vegetation.

LAND USE SUMMARY
The main driver of the proposed land uses for the site was the County’s desire to have both a financially self-sufficient project and one which can be secured in the near term to avoid costs that accrue from non-use of the property. The panel focused on market realities to arrive at the proposed residential and commercial project that respects the historic site. It was concluded that the Yard and Reformatory areas had negative land values. The Ball Field and new construction areas within the Yard and Reformatory represented opportunities to create value and generate revenue that could be used to offset costs associated with the adaptive reuse of the historical buildings. The panel determined the proposed project should have a positive overall value. A key benefit to the project from a public perception perspective was that the types of residences proposed would not likely generate much of a school-age population.

Overall considerations for the site include establishing a cultural center at the Reformatory area to complement the proposed Occoquan Workhouse facility. This could increase the site’s potential as a retail destination, as opposed to a largely residential community and village center. Additionally, if a single-use can be located for either the entire 85-acre site, or even the Reformatory component, the dynamics of the site could be altered dramatically and more of the historic fabric preserved. However, the reality of either of these two things happening is questionable, especially in the near term.
IMPLEMENTATION & FINANCE
The panel determined that the implementation and financing of the project were inherently related. A public-private partnership was recommended over a procurement or outright sale scenario given the nature of the project. The County would be better served and could create more value by locating a private sector partner with a similar vision for the site. Following is a potential model recommended by the panel:

1. The County planning staff would take the lead for implementing the project, with input at select times from the Citizen’s Task Force.
   - A firm timeline should be set and followed.

2. A two-step Request for Qualifications (RFQ) and a following Request for Proposal (RFP) process is recommended for selecting a partner.
   - Potential candidates would be evaluated based on an established scoring matrix, which would be designed to give weight to various elements important to the County.
   - The project vision, timeline, and financial commitment for infrastructure improvements should be made clear by the County in the RFP materials.

3. Selection of the development team should be done by the developer and not the County.
   - Potential development teams would be interviewed, and have references checked.
   - Some initial candidates would be eliminated, at which point the County would more closely scrutinize the financial plan provided by the remaining development teams.
   - Following execution of Letters of Intent, public presentations may be desirable (prior to this point, it may only create false expectations without financial reality).
   - Two finalists would then be selected. The County would simultaneously negotiate with both entities and select the most viable candidate. A partnership would then be established through a letter of intent.

The panel recommends that no public presentations be given until the Letter of Intent is executed. This will avoid development teams issuing “pretty pictures” that may not be financially viable.

Timing
The panel concluded that time is of the essence. The public-private partnership will be complex to negotiate and the historic buildings will only deteriorate over time thereby driving up the costs associated with preservation and adaptive reuse design issues. County staff should monitor the development, but not micromanage it or allow committees to micromanage development implementation.
CONCLUSION
The residential and village center adaptive reuse plan for the 85-acre site proposed by the panel would provide the County with a financially self-sufficient project that has the potential to be an excellent example of adaptive prison reuse and accommodates historic preservation considerations. The proposed plan would also result in an opportunity to provide retail that can serve adjoining residential areas and provide a unique sense of place for the overall community.
DESIGN CONCEPT “B”

Penitentiary “The Yard”

Baseball Field Area/ Main Street Village Center

Reformatory Area
MASHPEE COMMONS
MASHPEE, MASSACHUSETTS
PROJECT TYPE
A neotraditional community shopping center and centerpiece of a planned new town has been reconfigured from a 1960s-era strip mall. It includes almost double the original retail space plus office space above the stores, and is designed to resemble a pedestrian-oriented New England village center.
SPECIAL FEATURES
- Neotraditional design
- Street-front retail
- Offices above the stores

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DOCUMENT IMAGES (frequently asked questions about images)
1. The traditional New England-style architecture of Mashpee Commons is...
2. Pedestrian amenities include colorful awnings, protective overhangs...
3. The post office holds a prominent position; although physically...
4. An entertainment complex anchors one end of the shopping center; the...
5. Bird’s eye perspective, community shopping center.
6. Site Plan

GENERAL DESCRIPTION
Mashpee Commons is a two-level 152,058-square-foot neotraditional community shopping center with associated office space. It is the centerpiece of a planned 294-acre new town that will include, at completion, retail, office, single and multifamily residential, hotel, civic and cultural, and parking uses. The shopping center, on 25 acres with 905 parking spaces, is a renovation and expansion of an 82,000-square-foot strip mall that was constructed in 1968 at the Mashpee Rotary, where Routes 151 and 28 intersect in the largely rural, western part of Cape Cod, Massachusetts. At buildout, zoning allows 300,000 square feet of commercial (office and retail) space and 100 residential units on the 25-acre site. The
ultimate ratio of retail to office space and the development schedule will be determined by market
demand.
Currently 24 units of elderly housing, a public library, a church, fire and police stations, and a medical
office building are adjacent to shopping center in other sections of the new town.
The remade shopping center has traditional streetfronts with office and future residential uses above the
stores. It is integrated physically, in an outdoor pedestrian environment, with the other downtown
activities to adapt the requirements of modern retailing to an indigenous urban design form—the
traditional New England town center.

HISTORY AND STRATEGY
Cape Cod has grown dramatically in recent decades as a seasonal resort and second home location. Its
popularity has brought new commercial development. Much of the growth has occurred along nondescript
commercial strips that often extend for miles on the edges of historic towns. Mashpee, largely overlooked
by developers, was not seriously affected by these trends.
The original 82,000-square-foot (GBA) strip center was developed in 1968 on a 92-acre site. It contained
26 convenience-oriented stores and was anchored by a 20,000-square-foot food store and a 14,000-
square-foot variety store. By the early 1980s, the market area around the center had grown considerably
in population and income, and the developers determined that the center was too small to meet demand
and needed to be upgraded to current market standards.
In 1985 the developers became intrigued by the possibility that they could remake their shopping center
in a neotraditional way. The developers, with long-standing personal ties to the Cape, wanted to
demonstrate that new development could serve the community without adding to the sprawl so apparent
elsewhere in the region. To further their plans, they began to acquire surrounding properties.
In 1986, the plans for Mashpee Commons were approved, and construction began. Phase I, complete in
July 1988, included

• renovation of the existing 82,000-square-foot strip center, including new facades, sidewalks, street
trees, and lamps;
• improvement of the site's infrastructure, including a new wastewater treatment plant, improved
highway access, and improved landscaping; and
• construction of 59,000 square feet of new buildings.

Individual buildings are constructed only after they are 50 percent preleased. The developers are willing to
sell parcels to other developers or users; however, to date all developed parcels have been leased except
for the new church site.
Financing for the $13,704,860 Phase I infrastructure, renovation, and new construction costs was
accomplished through a two-year construction loan that was flipped to a three-year mini-permanent loan
in December 1990. Both loans were received from the Bank of New England.

PUBLIC APPROVAL PROCESS
The developers found that while their plans for remaking the Mashpee shopping center were traditional in
design, they represented a radical departure for the community and its Board of Zoning Appeals. After 11
months of negotiation, the board was persuaded that the existing C-1 zoning would allow not only the
envisioned neotraditional design but also the development's proposed mix of uses. No subdivision
approval was required, but a special permit application had to be filed and approved. The following
conditions and requirements were agreed upon to gain public approval:

• The proposed footprint of the remade center to be designated and approved in advance;
• Commercial development (retail and/or office space) limited to 300,000 square feet;
• 100 residential units on the second level above the retail space;
• A wastewater treatment plant to be built to serve the expanded Mashpee Commons and the rest of
  the planned town center.
• Each new building planned for the center to be submitted for design review and specifically approved before it can be built; and

• The shopping center's streets to be owned and maintained by the developer and considered part of the shopping center's internal circulation and parking system; this arrangement eliminates the 40-foot setbacks required by zoning.

Avoiding the need for rezoning and subdividing the site greatly simplified the approval process and reduced the time required to gain public approval of the shopping center.

PLANNING AND DESIGN
The planning and design goals for Mashpee Commons reinforce its neotraditional focus. One of the most important goals—integrating other activities with shopping—has been accomplished in several ways. First, 1.8 acres of land on the new town's village green, adjacent to the shopping center, were donated to the community for 24 units of elderly housing and two acres were donated for a public library; eight acres were sold to build a new church for a local congregation on another side of the green; and negotiations are underway with Mashpee to relocate its town hall to a leased site on the third side of the green. Phase II of Mashpee Commons will occupy the remaining side. A post office has been included in the shopping center and designed to reinforce its civic importance. Office space has been designed for the second level of the center in Phase I, but residential units will be provided on the second level of Phase II. The mix is designed to provide diverse uses and is a function of market demand; of 30,000 square feet of office space, 27 percent is still vacant after more than three years of leasing efforts.

Until recently, each building was designed by a different architect in an effort to create diversity. This effort was management-intensive, and the goal has been relaxed. All new development must adhere to strict architectural and site-planning codes that were drawn up with the help of planners Andres Duany and Elizabeth Plater-Zyberk to create a harmonious, traditional town center appearance. Restrictive sign ordinances have also been developed. In future phases, access roads from the arterials into the center's parking lots will be lined with retail or mixed use structures to link the center with surrounding neighborhoods and permit easy pedestrian access among them.

MANAGEMENT AND MARKETING
The developers manage all aspects of Mashpee Commons; they consult the merchants association, an advisory body, before making major decisions. Marketing of the shopping center reflects the physical changes that have taken place. A former neighborhood convenience center is now marketed as a community specialty center with a deliberate mix of upscale national chain stores and mom-and-pop stores, including tenants from the original center. This approach is designed to differentiate Mashpee Commons from more standardized malls on the Cape.

The goal is for customers, both local and seasonal, to perceive the shopping center as having everything that a department store would have, only spread out among individual stores. To accomplish this, tenant spaces were increased from 26 to 64 in Phase I. New anchors include six restaurants, a six-screen movie theater complex, and a drugstore. The food store will soon be relocated across Route 158 to open up new, specialty retail spaces and to eliminate a long blank wall that deadens a major retail street. The new food store, three times as big as the old one, will be joined by 30,000 square feet of neighborhood convenience stores. During the remaking of the shopping center, existing tenants were given the option to stay, and most chose to; however, the developers bought out one lease—that of the large variety store. It occupied a prime site the developers wished to redesign into smaller specialty stores with greater drawing power. The renovated shopping center's design and marketing concepts have been well received in the market, as shown by higher sales and rents.

EXPERIENCE GAINED

• Pioneering a neotraditional development concept for a shopping center will cause headaches but bring great rewards. Mashpee Commons succeeds in an overbuilt market where other centers are struggling, and offers a way to avoid the sprawl and congestion of many commercial strips. Its incremental construction approach permits a new shopping center to be tailored to current levels of retail demand while providing a framework for growth.

• Centralized management is critical, at least in the early stages. Advertising, common-area maintenance, promotional events, architectural and design controls, and leasing need to be
coordinated to create a strong foundation for the long term. A merchants association is useful in an advisory role.

- A successful shopping center today should have a strong identity and community focus from the beginning. Mashpee Commons doubles as an arts and cultural center, with a developer-sponsored concert series and a variety of special events. Many people now think of Mashpee Commons as their community center; this has been a major factor in the project’s success.

**PROJECT DATA**

**LAND USE INFORMATION**

**Site Area**
New Town Center: 294 acres  
Mashpee Commons Community Shopping Center: 25 acres

<table>
<thead>
<tr>
<th><strong>Gross Building Area (GBA)</strong></th>
<th><strong>Square Feet</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Before renovation</td>
<td>82,000</td>
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<tr>
<td>After renovation</td>
<td>152,058</td>
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<table>
<thead>
<tr>
<th><strong>Retail Gross Leasable Area (GLA)</strong></th>
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<tr>
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<td>71,000</td>
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<tr>
<td>After renovation</td>
<td>150,630</td>
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**Parking**
Before renovation: 416  
After renovation: 905

**DEVELOPMENT COST INFORMATION**

**Redevelopment Costs**

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<thead>
<tr>
<th>Cost</th>
<th>Amount</th>
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<tbody>
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<td>Site improvements</td>
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<tr>
<td>New building construction</td>
<td>3,992,954</td>
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<tr>
<td>Building renovation</td>
<td>699,790</td>
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<td>Soft Costs</td>
<td>3,914,395</td>
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<tr>
<td>Off-site improvements</td>
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<td>Tenant allowance</td>
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<td>Total</td>
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**ANNUAL OPERATING COSTS**

<table>
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<tr>
<th></th>
<th>Before Renovation</th>
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<tr>
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<td>$148,163</td>
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<tr>
<td><strong>After Renovation</strong></td>
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<td>Taxes</td>
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<td>Insurance</td>
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<td>Services</td>
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<td>Utilities</td>
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<tr>
<td>Legal</td>
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<tr>
<td>Classification</td>
<td>Number of Stores</td>
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<tr>
<td>--------------------------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>Food</td>
<td>5</td>
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<tr>
<td>Food service</td>
<td>4</td>
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<tr>
<td>Clothing and accessories</td>
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<td>Jewelry</td>
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<tr>
<td>Liquor</td>
<td>1</td>
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<tr>
<td>Drugs</td>
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<tr>
<td>Other retail</td>
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<tr>
<td>Personal services</td>
<td>7</td>
</tr>
<tr>
<td>Recreation/community</td>
<td>3</td>
</tr>
<tr>
<td>Financial</td>
<td>3</td>
</tr>
<tr>
<td>Offices (other than financial)</td>
<td>5</td>
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<tr>
<td>Vacant</td>
<td>8</td>
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<tr>
<td>Total</td>
<td>64</td>
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<tr>
<td>Total before renovation</td>
<td>26</td>
</tr>
</tbody>
</table>

**LEASE INFORMATION**

- **Average Annual Sales:** $242 per square foot
- **Average Annual Rents (before renovation):** $6-12 per square foot
- **Average Annual Rents (after renovation):** $10-12 per square foot
- **Average Length of Leases:** 3-5 years
- **Typical Terms of Lease:** Triple net plus a percentage of sales over a natural break point

**DEVELOPMENT SCHEDULE**

- **Original Shopping Center Opened:** 1968
- **Planning for Renovation/Expansion Started:** 1985
- **Construction Started:** 1986
- **Phase I Completed:** 1988
- **Final Completion:** To be determined by the market

**DIRECTIONS**
From Boston:. Take Route 3 south across the Cape Cod Canal to Bourne. Turn left onto Route 28 and proceed to Route 151. Turn left onto Route 151 and proceed to the intersection with Route 28 at the Mashpee Rotary. The project is on the southwest quadrant of the rotary. 

Driving time from Boston:. Two hours in nonrushhour traffic.

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1025 Thomas Jefferson Street, N. W. Ste. 500w, Washington, D. C. 20007-5201
KENTLANDS
GAITHERSBURG, MARYLAND

PROJECT TYPE
A 352-acre planned community that uses traditional neighborhood and community design principles to create a small town feeling. The design relies on a hierarchy of streets built in a modified grid, with most homes close to the street on small lots ranging from 2,500 to 9,000 square feet. The community incorporates a variety of housing types—including detached, attached, apartments, and condominiums—as well as a school, a shopping center, a child care center, and a recreation center.

SPECIAL FEATURES

- Neotraditional planning
- Alleys
- Detached garages with second-level apartments

DEVELOPER
Great Seneca Development Corporation
8401 Connecticut Avenue
Chevy Chase, Maryland 20815
301-986-6000

DEVELOPER/CONSULTANT
Joseph Alfandre & Co., Inc.
1355 Piccard Drive, Suite 380
Rockville, Maryland 20855
301-670-0343

TOWN PLANNER
Andres Duany and Elizabeth Plater-Zyberk, Architects
1023 SW 25th Avenue
Miami, Florida 33135
305-644-1023

DOCUMENT IMAGES (frequently asked questions about images)
1. Single-family homes are located close to the street on 4,400- to... File size: 44k
2. Many homes include garages served by alleys; some garages also have... File size: 14k
3. Townhouses vary in height and width—ranging from 16 to 24 feet wide... File size: 25k
4. Porches are a common feature throughout... File size: 19k
5. Brick sidewalks, narrow boulevards, and street trees on at least one... File size: 45k
6. Architectural styles are traditional, and include Georgian,... File size: 17k
7. Site Plan. File size: 54k

GENERAL DESCRIPTION
Kentlands is a 352-acre neotraditional planned community with 1,655 residential units and up to 2 million square feet of retail and office space planned. Referred to by its planners as a traditional neighborhood development (TND), the community has been designed and planned to function like a small town. Streets are narrow and are organized in a modified grid pattern. Large and small single-family homes and
Townhomes are built close together on relatively small lots—ranging from 2,500 to 9,000 square feet—to promote neighborliness as well as to allow individuals of all generations and various income levels to live in the same neighborhood.

Public open spaces, traditional architecture, and strict design guidelines are hallmarks of the project, and the community has become one of the best-known examples of neotraditional planning in the country. The project was started by Joseph Alfandre & Co., which worked with the planning firm Andres Duany and Elizabeth Plater-Zyberk, Architects, to develop the overall planning principles. The project was taken back by the lender—Chevy Chase Federal Savings Bank (CCFSB)—in 1991 in a friendly foreclosure and is now being developed by the Great Seneca Development Corporation, a subsidiary of the bank. The community is divided into five neighborhoods and includes single-family detached homes, townhouses, condominiums, apartments, a community shopping center, a clubhouse and recreation center, an elementary school, a child care facility, and a church.

THE SITE AND DEVELOPMENT PROCESS
Kentlands is located 23 miles northwest of downtown Washington, D.C., near the Interstate 270 corridor, in the city of Gaithersburg, Maryland. In 1987, when Alfandre obtained a one-year option on the property, the site was the last available large tract of land in the city of Gaithersburg. Alfandre has been building homes in Gaithersburg and other areas of Montgomery County since 1983. At the time of the option, the land was not zoned, and the only buildings on the property consisted of the Kent family farm buildings, including the Kent Mansion, a barn, a firehouse, a guesthouse, and several other outbuildings, all arranged in a sort of minivillage. The property also consisted of numerous lakes, ponds, and even a quarry that remain to this day.

Alfandre first went to several respected land planning firms in the Washington area, but he found their proposed master plans too typically standard and suburban; he wanted to develop something a little different. A short time later he met Andres Duany. In 1988, Alfandre hired Duany's firm to organize and conduct a seven-day charrette to develop design and planning principles for the site. Citizens and politicians were invited to participate in the charrette. Surprisingly, density issues were not a controversial part of the planning process, although the city's professional planning staff did have some reservations, which were eventually overcome, primarily related to traditional zoning and code requirements. Alfandre and Duany then developed a detailed plan that was refined and adopted by the city in 1988.

PLANNING AND DESIGN
The site plan includes five neighborhoods that are shaped in part by a series of lakes and wetlands that run through the middle of the project, essentially dividing it into two sections. The large section to the west is where most development has occurred thus far, and a smaller section to the east is less developed. The street system design includes seven entrances—three major and four minor—from the three major roads that surround the property and uses a modified grid system. The system is made up of main streets, which are boulevards with parking as well as trees on both sides; primary streets, with parking and trees on both sides; and secondary streets, with parking on one side and trees on the other. There are no culs-de-sac. Public parking consists largely of street parking, which is allowed nearly everywhere in the community. Parking lots are generally allowed only near multifamily properties, and head-in parking is used in mixed-use areas.

The design sought to achieve higher densities than more typical suburban planned unit developments (PUDs), and thus many fairly large single-family homes are built on small lots, creating a more urban feel. Typical lots for single-family homes are 4,400 to 6,600 square feet and homes are 12 to 20 feet apart on average, with some smaller homes as little as four feet apart. Alfandre emphasizes that neotraditional communities need not be built at such high densities; he is building another project in Loudoun County, Virginia—Belmont Forest—that will have half the overall density of Kentlands.

Shared open space is an important element in Kentlands that complements the small lots. Numerous small parks and squares throughout the project serve purposes ranging from providing room for pickup football games to offering simple visual amenities for residents. Public spaces are essential for defining the character of the community as a whole. Some of the parks are open squares surrounded by streets, others are wooded, and still others include houses that face directly onto the park with no intervening street, just a walkway.

Another important concept used in the project is the mixture of home types and designs often on the same street. This mix includes attached and detached housing, as well as houses of varying sizes and costs. Some streets have homes by as many as five different builders, unlike many subdivisions and PUDs, which contain sections built largely by one builder, resulting in houses that are often very similar. Townhomes are designed to be very different from typical suburban models. For example, several townhomes near the mansion face onto a narrow street, with on-street parking and a square across the
street; garages are located behind the houses and are accessible from a rear alley. The homes themselves in this area are all located close to the street—the same six-foot setback for each house—and the homes are generally dark brick and have steeply pitched roofs. Perhaps what is most unusual about the townhouses, in both this area and other areas of the project, is that architectural variety is achieved not by substantially changing the architectural style and setbacks, but by varying the width and height of each townhouse within each grouping. Thus some of the homes are two stories and some are three, while widths vary from 16 to 24 feet.

The design code specifies the placement of the home on the lot and requires the use of brick, stone, or wood on the exterior. A hedge, fence, or wall is required along the sidewalk. Detached residences include a variety of traditional styles, including Georgian, Victorian, and Shingle. Homes often have numerous customization options, such as finished third floors and garages with apartments above. Some of the homes are also designed to look like they have had additions.

Amenities built thus far include a one-mile jogging and bike trail (with two additional miles planned), three lakes for fishing and bird watching, three tot lots (with two more planned), and several squares, parks, pocket parks, and picnic areas. The 3.9-acre Kentlands Recreation Center is available to all homeowners at no extra charge and includes a 25-meter lap pool, a separate social pool, a tot pool, four tennis courts, basketball and volleyball courts, and a two-story clubhouse with fitness room, lounge, and kitchen facilities.

Commercial and institutional uses include the 350,000-square-foot Kentlands Square Shopping Center, located at the northeast corner of the site, whose tenants include Giant Food, Kmart, Lowes Hardware, and Super Crown Books. The community also contains the 800-student Rachel Carson Elementary School, the Kentlands Children’s Center, and a church. The Main Street phase of the project, the last phase planned, will be a mixed-use town center, which is conceived to include for-sale live/work units along a main street, with a mix of retail, office, and residential uses. Live/work units will be sold with flexible zoning to allow any combination of uses in typically two or three stories.

**MANAGEMENT AND MARKETING**

Management of the project’s development has changed hands once during the development process. Kentlands began as a project of Joseph Alfandre & Co., with Chevy Chase Federal Savings Bank (CCFSB) providing a $64 million three-year loan to finance land acquisition and development. With a long-term program, a savings and loan bank as the primary lender, and a real estate recession looming, it is easy to see in hindsight that the project was headed for trouble. When recession hit the real estate industry and then the S&L industry, a crisis developed for the project. The first problem was that a key component of the financial plan—the sale of a 100-acre parcel for $25 million for a proposed mall—fell through in 1989 because of problems in the department store industry. Next, the recession hit and slowed home sales—especially for homes in the $300,000 to $500,000 range where most of the Kentlands homes were priced. These initial problems in turn were followed by new standards set by the Financial Institutions Recovery, Reform, and Enforcement Act that forced CCFSB to scrutinize the project more carefully. CCFSB slowly began turning off the tap for financing new construction, and with sales slowing, cash flow drying up, and lenders calling loans on Alfandre’s other projects, Chevy Chase decided in 1991 to undertake a friendly foreclosure on the property. The bank maintained that Alfandre's financial statement was not big enough to continue funding the loans in the current environment, and it took back the deed in lieu of foreclosure. Although Alfandre lost control of the project and his equity, he was retained as a development consultant, and he also continued to build homes in the project. CCFSB has taken back several other large planned communities in the Washington area in recent years and has used a similar strategy in each case, continuing to work with the original developers rather than simply foreclosing on the property and selling off assets. Alfandre is not bitter about losing the project and believes that CCFSB was extremely fair in its dealings with him, given the tough situation they were both in.

CCFSB was able to see the project through the tough times. The bank created the Great Seneca Development Corporation to continue developing the project, and it continued to fund homebuilding in the project, including Alfandre’s homebuilding business. Great Seneca largely stuck with the plan and did not seek new entitlements.

Alfandre believes the project was taken back because of the real estate recession, not because of any fundamental flaw in the planning concept. The fact that sales have been strong following the recession is evidence that he is correct. Single-family home sales totaled roughly 100 in 1991, 200 in 1992, 300 in 1993, and 200 in 1994; sales as of the end of 1994 totaled 800. During 1993, Kentlands achieved the highest sales of any project in Montgomery County, but the market in 1994 shifted toward more affordable products, slowing sales a bit. The project is currently more than 50 percent built out, and the presence of a town has definitely been achieved.
The recession forced the developer and builders to emphasize less expensive products, including 1,300- to 1,500-square-foot cottages priced around $220,000 that sold well. For the most part, however, the project has maintained the product mix set forth in the original plan, which relies heavily on fairly large detached homes in the $300,000 and up range. Most of the homes have been built on a contract basis, allowing customization of the home products and reducing risk for homebuilders. There are few model homes, as most of the builders are small companies that prefer not to absorb the cost of building and furnishing a model. For custom homes, a 5,500-square-foot lot typically sells for around $100,000.

Marketing for the project has been blessed by plenty of free publicity. Since the project was first begun, numerous articles have appeared in both the local and national press, including a 1992 piece in Time magazine, which cited Kentlands as one of the best designs of 1991. Full page adds run regularly in the Washington Post.

Alfandre believes neotraditional communities need to be marketed differently from typical new developments; the developer needs to visually show the homebuyer at the outset how life is different in the community. That is why the information center for Kentlands is located in the historic barn next to the mansion, well inside the project, not at a prominent location near one of the main entrances. By bringing the buyer to the historic center of the community, where a model of the overall plan is located, the developer is able to show the kind of community character that is being created.

All property owners in Kentlands are members of the Kentlands Citizens Assembly. The assembly provides for the maintenance of commonly owned properties and facilities, including private alleys and parking areas, green areas, landscaping along public rights-of-way, recreation facilities, tot lots, and equipment. In addition, the assembly runs the Kentlands Clubhouse and assures the architectural integrity and appropriate maintenance of the homes and lots within the community through the years. The town planners are charged with enforcing the design code during the development process. The Kent Mansion has been deeded to the city of Gaithersburg and is now the home of the Gaithersburg Council for the Arts. Public events at the mansion include musical concerts by the National Chamber Orchestra, monthly art exhibits, lectures, play readings, business conferences, and receptions.

**EXPERIENCE GAINED**

- It is crucial to develop a signature defining space—such as a square, intersection, core, or village center—early in the development process to set the tone and illustrate clearly how the neotraditional project is different from other suburban community designs.

- While architectural control is important to the success of neotraditional communities, too much control can be bad. Alfandre believes that control was a little too tight at Kentlands, placing too many restrictions on builders, who generally know better what the market wants than do the designers or land developers.

- While the use of alleys helps to define a more interesting overall community design, alleys should not be overused. On hilly or otherwise difficult topography, alleys are not the best choice, and Alfandre believes that attractively designed front-loaded garages might have worked better in some neighborhoods.

- While some have suggested that neotraditional communities are inherently more expensive to build, resulting in a smaller lot or house for the money, this is not necessarily so. Nearly all modern community designs include open space and significant landscaping budgets, and these costs need be no higher in a neotraditional community than in a more typical PUD design. In fact, the smaller lots that often characterize such communities can actually result in lower-cost housing products for buyers. It is not the amount of public open space and landscaping that sets these communities apart, but rather how this space is shaped or formed and how it is used.

**PROJECT DATA**

**LAND USE INFORMATION**

- Site Area: 352 acres
- Total Dwelling Units Planned: 1,655
- Total Dwelling Units Completed: 1,040
- Gross Density: 4.7 units per acre
- Average Net Density: 7.0 units per acre
## LAND USE PLAN

<table>
<thead>
<tr>
<th>Land Use</th>
<th>Acres</th>
<th>Percent of Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-family residential</td>
<td>109</td>
<td>31%</td>
</tr>
<tr>
<td>Multifamily residential</td>
<td>28</td>
<td>8</td>
</tr>
<tr>
<td>Roads</td>
<td>48</td>
<td>14</td>
</tr>
<tr>
<td>Common open space</td>
<td>56</td>
<td>16</td>
</tr>
<tr>
<td>Kentlands Square Shopping Center</td>
<td>37</td>
<td>11</td>
</tr>
<tr>
<td>Other commercial/mixed-use</td>
<td>54</td>
<td>15</td>
</tr>
<tr>
<td>Civic uses</td>
<td>20</td>
<td>6</td>
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<tr>
<td>Total</td>
<td>352</td>
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## RESIDENTIAL UNIT INFORMATION

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<thead>
<tr>
<th>Unit Type</th>
<th>Unit Size (Square Feet)</th>
<th>Number of Units Planned/Built</th>
<th>Range of Current Sales Prices/Rents</th>
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</thead>
<tbody>
<tr>
<td>Detached single-family</td>
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<td>477/325(^1)</td>
<td>$275,000-500,000</td>
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<tr>
<td>Townhomes</td>
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<td>378/242</td>
<td>$215,400-319,900</td>
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<tr>
<td>Condominiums</td>
<td>1,000-1,400</td>
<td>560/233</td>
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<tr>
<td>Apartments(^2)</td>
<td>650-1,200</td>
<td>240/240</td>
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## DEVELOPMENT COST INFORMATION

(At Buildout)

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<td>Site Improvement Costs</td>
<td>20,000,000</td>
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<tr>
<td>Construction Cost(^3)</td>
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<tr>
<td>Soft Costs(^4)</td>
<td>5,000,000</td>
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<tr>
<td>Total Development Cost Expected at Buildout(^5)</td>
<td>$67,000,000</td>
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</tbody>
</table>

**Notes**

1. Includes 68 cottages-1,300 to 1,500 square feet—all of which have been sold.
2. Thirty accessory apartments have also been built but are not included in totals.
3. Includes construction costs for the recreation center and the child care center and for modifications to the school and renovation of the existing Kent Farm buildings.
4. Soft costs are unusually low because CCFSB is both developer and lender; as a result, interest charges are unusually low.
5. Excludes all homebuilding costs.

## BUILDERS ACTIVE IN THE COMMUNITY

- Bozzuto
- Churchill Group
- C-I/Mitchell & Best
- D.R. Horton Custom
- Joseph Alfandre Homes
Newport Classic Homes
Pillar Home Builders
Ricklin Homes
Rocky Gorge Communities
Stonewall Homes
Trinity Custom Homes
Victorian Homes by Stinson

DEVELOPMENT SCHEDULE

Property Option Acquired: 1987
Site Purchased: June 1988
Planning Started: 1987
Construction Started: June 1990
Sales Started: June 1990
Expected Project Completion: 1998

DIRECTIONS

From Washington National Airport: Take the George Washington Parkway north to I-495 (Capitol Beltway). Follow 495 north to I-270 north. Take exit 6B for Route 28 west, and proceed west four miles to project entrance on the right.
Driving Time: Approximately 40 minutes in nonpeak traffic.

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