

Wednesday, May 17th, 2023

Rob Hodges
Essex County Planning and Zoning Administrator
Plats Officer/ Subdivision Agent
202 South Church Lane
P.O. Box 549
Tappahannock, VA 22560
(804) 443-4329

Subject: Applicant Response to 4.24.2023 comments and staff reports

Dear Mr. Hodges,

This letter is in response to the comments received on April 24th, 2023 as well as the staff reports and questions provided during the April 11th and April 26th meeting with Mr. Hodges. We have been requested by staff to clarify our March 2nd application request. To not be duplicative, we have summarized the comment responses into attached FAQ document.

Application Request

We are requesting the Planning Commission to recommend and Board of Supervisors to approve:

- The rezoning of Parcel 36 43 from B-1 to PUD
- Preliminary Site Plan with all waiver and special exceptions as noted in Preliminary Site Plan and Special Waivers dated May 5th, 2023

Please utilize the following documents as our application: 1) March 2nd submission; 2) May 5th amendment and 3) this supplemental May 17th response as our package.

At the recommendation of County staff provided in its April 24th letter, we are removing the request for the Housing Revitalization Legislation and access to Water/Sewer from the above-referenced applications. We will submit separate applications directly to the Board of Supervisors for approval of those items.

Project Summary

We have presented the proposed development “**Essex Point at Mt Clement**”. The development is a planned community with housing, commercial and community space that will be impactful and transformative to the County. The project is a new mixed-use development that focuses on making a positive impact on the lives of Essex County residents, with a focus on healthcare, wellness, education, and housing. The proposed uses include 55+ retirement community, centralized wellness/community services hub, workforce housing, commercial and retail. The site development program on the Preliminary Site Plan depicts approximately 176,556 gross square feet of residential uses; 64,737 gross square feet of commercial/retail uses; 14,307 gross square feet of community center uses; and 1,194 retail drive-thru.

This proposal is consistent with the recommendations of the Comprehensive Plan and advances its goals. The subject site is located within the Development Service District area of the Comprehensive Plan. This plan area is designated for near-term development to allow for growth to be located in close proximity to the Town of Tappahannock and preserving the rural character of areas of the County located farther from the Town.

One of the specific recommendations for the Development Service District is that the Planned Unit Development (PUD) zone be used as a vehicle for this development. Indeed, the property’s existing B-1 zoning cannot accommodate the mixed-use nature of development called for by the Comprehensive Plan.

The applicant's submitted materials provide significant additional information regarding compliance with the Comprehensive Plan.

Key Components

- **Workforce Housing – 48-units** that will be part of an active mixed-use community with a mixture of commercial and housing facilities. The proposed units are workforce housing, marketing towards teachers, healthcare workers, law enforcement, municipal and county employees, and other human-service employees.
- **Wellness Spaces –** Ground level commercial space of **20,829 gsf**. The ground level commercial space is targeting community-centric retail. We envision spaces for wellness providers that can support health, education, and service providers. Included in our ground level commercial space, we have an Expression of Interest from a proposed anchor tenant, YMCA. YMCA's Expression of Interest includes Express YMCA and Child Development Center with Before and After School Program.
 - **Learning Facility – 6,261 gsf** – Proposed YMCA Childcare Development Center w/Before and After School Program, Indoor/Outdoor Playground area, and Sylvan Learning Center
 - **Fitness Center – 11,400 gsf** - Proposed YMCA Fitness Center including group exercise, wellness center, fitness area (basketball/pickleball), rehab space, and child watch.
 - **Emergency Services Office – 311 gsf**
- **Retirement Community – 91-units** that will be an active amenity-rich lifestyle retirement community for seniors (age restricted 55+ independent living). Amenities include convenience store, bike storage, pet spa, telehealth area, library, great room, club room, terrace, game/activity room, outdoor seating, terrace, putting green, etc.
- **Community Center – 14,307 gsf** of innovative and “state of the art” community center with both indoor and outdoor facilities that can be utilized by any member and/or organization in the community. Our indoor facilities will have a capacity of **400 people**. We envision the community center to be a space where meetings, seminars, trainings, children's activities, events, graduations, concerts, weddings, seasonal festivals, pop-up shops, retreats, etc. can be held. The outdoor public space will comprise of terrace, amphitheater, main street, and walking/bicycle trails. Our amphitheater space will have capacity of **125 people**.
- **Commercial/Retail –** Commercial building with **45,102 gsf** inclusive of ground level commercial space of 14,390 gsf; 29,518 gsf additional commercial space and 1,194 gsf of retail drive-thru. We envision both local, regional, and national community-centric tenants. We have the flexibility to have smaller spaces so that local retailers and/or small businesses will have access to the space as well.

Background and Vision

This proposed development is the culmination of long-term family ownership of approximately +/- 47 acres in Essex County, since 1878. The Harris Family commitment to the area started in the 19th century with Thomas Croxton Harris (my great-great grandfather) and continues through generations to the present day. Our family has not only owned land but run numerous long-standing businesses over the years.

This deep-rooted family that has been building and investing in this community for almost two centuries. Our story began with Thomas Croxton Harris who operated a small store and horse business; his daughter Virginia F Harris owned and operated a successful Bray's Fork restaurant, convenience store and service station. In addition, she owned and operated a Greyhound bus station, operating as the only Black owned agent in the state at that time. Lastly, his grandson Thomas Caldwell Harris was a serial entrepreneur and visionary. He took over the ownership of the elder Thomas' store and his Aunt Virginia's Bray's Fork Service Station. Then would go on to open the Harris Family Drive-in, landscaping business, electric motor repair service, and Store-Tel mini storage facility. The Store-tel mini storage is still run to this day, by his son Ira Harris. His daughter Landowner (June Monterio) and granddaughter Developer/Sponsor (Shiree Monterio) are proposing a new planned community in Virginia (rural area).

Our development plan is a vision inspired by and contributed to by many generations from the past and generations to come. Our family has a long-standing footprint in Essex County, specifically in the Brays Fork area. We look forward to continuing to create a "place" and impact lives in a positive and sustainable way. We see this project as the initial phase of a larger "Brays Fork Revitalization Project".

Our site is in Essex County; just outside of the town of Tappahannock adjacent to the VCU Health Regional Hospital. This vision will bring a vibrant community that will sit at Bray's Fork, the crossroads of two major thoroughfares, Route 17 and Route 360.

As long-term owners, we will remain as the owner/operators of the community and will hire experienced property management firms that will "**maintain and enforce**" strict rules and regulations. As described above, our family has been active as community leaders and business owners for almost two centuries and we are committed to build on our legacy and remain active and impactful members of the community. This project is not just a brick and mortar or a way to make a quick dollar, but it is the family coming back to do "**good**" on the land and legacy that our family with deep-roots work so hard to build. We are committed to this legacy and doing as our previous generations would have wanted us to do - use the land in a way that will serve, benefit, and strengthen the community that they loved and served.

Process Timeline

Below provides a timeline of the efforts during this process. Full application packages meeting statutory requirements for these applications and prepared for staff review were submitted to staff on December 29, 2022 and March 2, 2023.

- General Development Plan Submitted to Zoning Administrator – **September 27th, 2022.**
- Presentation to Planning Commission – **November 1st, 2022.**
- Official Re-zoning and Preliminary Site Submission to Zoning Administrator – **December 29th, 2022.**
- Received comments back from Zoning Administrator – **January 10th, 2023.**
- Resubmission of Package to Zoning Administrator – **March 2nd, 2023.**
- Acceptance of Resubmitted Package & notified May Planning Commission from Zoning Administrator – **March 15th, 2023.**
- Zoning Administrator received hard copies for PC, BOS, & County Administrator of submission – **March 24th, 2023.**
- Requested confirmation of May Planning Commission – **April 4th, 2023.**
- Informed of no public hearing date – **April 5th, 2023.**
- Received written comments from Zoning Administrator – **April 24th, 2023.**
- VDOT response comment letter to Zoning Administrator – **May 5th, 2023.**
- Submission response to Zoning Administrator – **May 17th, 2023.**

Let us know if you have any questions and/or concerns.

Thank you,

Shiree C Monterio
7 and M Development LLC

June C Monterio
Landowner

Encl: FAQ
 Comprehensive Plan Excerpts
 Support Letters
 Governor's Office Press Release
 VDOT Letter

FREQUENTLY ASKED QUESTIONS

1. How will the community benefit from this proposal?

The community will bring social services, community space for activities, housing, commercial space to attract businesses, additional jobs, increased local revenue/resources, and create a place for the community to gather.

2. How can the County be assured that we will bring what we are proposing (short term and long term)?

As long-term owners, we will remain as the owner/operators of the community and will hire experienced property management firms that will **“maintain and enforce”** strict rules and regulations. Our family has been active community leaders and business owners for almost two centuries and committed to build on our legacy and remain active and impactful members of the community. This project is not just a brick and mortar or a way to make a quick dollar, but it is the family coming back to do **“good”** on the land that our family with deep roots has worked so hard to build. We are committed to creating a legacy to do as the previous generations would have wanted us to do - use the land in a way that would serve, benefit, and strengthen the community that they loved and served. We will have a physical office and presence in Essex County that will be able to have direct oversight of the management company. The family is committed to not selling nor turning over ownership control to any ownership outside of the family.

As outlined in Zoning Ordinance, the approval will be subject to a number of proffered conditions that will outline the parameters of what is acceptable under the approval. If anything related to the development changes in a way that is inconsistent with the proffers, then as the applicant, I will be required to amend my application and return to the Planning Commission and Board of Supervisors.

Further, approval of this rezoning is not the final step in the process. It includes a Preliminary Site Plan, which is the first of several steps. We will be required to undergo review by the County for each subsequent step in the process: Final Site Plan, Building Permit, and Certificate of Occupancy. In each of those steps, the County will review the plan to ensure that we are staying within the bounds of our conditions.

3. Who is the market population you are marketing towards?

Our workforce housing units will be marketed to the existing and future working individuals and families (teachers, firefighters, police officers, nurses, social workers, etc.). Our goal is to ensure that the hard-working individuals and families in these important professions can have affordable rent and remove barriers by reducing cost burden. Income qualifications will be in place from the beginning of operations to ensure the individual or family will be able to afford the rent and won't cause the family to be cost burdened. An individual or family will need to meet evaluation criteria checks such as credit, criminal, etc. As the long-term owners/operators, we will work closely with property management to create and/or ensure implementation.

This project is in alignment with many of the Commonwealth's priorities and initiatives. As an example, in 2022 Governor Youngkin announced his **“Make Virginia Home”** Plan which promotes increasing the supply of attainable, affordable, and accessible housing. This plan focuses on utilizing land to increase the supply of workforce housing which will spur economic growth. We encourage the County to see this as a great example that can be promoted to do exactly what the Governor is calling for. Attached is a press release from Governor Youngkin's office.

The retirement community is an age-restricted 55+ independent living community for seniors. Our goal and plan is to ensure that seniors have housing where they can age gracefully and within a community that is supportive as neighbors and with services surrounding them.

4. How will we ensure the retirement community will be for seniors?

The retirement community will ensure that it will be age restricted based on the Fair Housing Act's "Housing for Older Persons" Exemptions. The management documents will outline the guidelines and qualifications of the age restriction.

5. [How is this community different from the other communities in Essex County?](#)

The distinguishing factors between our community and the other communities in Essex County is that:

- Our community is **more than just housing**. Our buildings have lot of amenities and amenity spaces offered to the residents to ensure that this creates and fosters a **“environment of community”** and not just a place to sleep.
- We are bringing a large concept to the county and region that are a mixture of uses that create more **active communities** and give residents a sense of pride in where they live. Our uses are focused on making for a better and stronger County.
- Many of the existing housing complexes that we have been compared to provide subsidized housing through rental subsidy programs. Where we believe that is truly needed housing and those individuals should not be discriminated against or excluded from having the opportunity to have safe and decent housing options, there is **no rental subsidy** as part of our development plan, and we are not providing subsidized housing. The County staff have expressed a concern of residents moving from any of the existing communities to our community. We do not foresee this as a concern because the individuals and families that live in these other communities would not be able to afford to pay the rent and live at our community without rental subsidy. Since our development does not have rental subsidy, then those individuals would not qualify.
- Our mixture of uses will **attract new businesses** and provide much needed space for service providers to have facilities to be able to provide their services to the County.

6. [How will you impact water/sewer infrastructure?](#)

As outlined in our May 2nd narrative, the development will have no negative and adverse impact on the water/sewer system. Our development will require approximately 51,000 GPD from both water and sewer services. It is our understanding that there is a contract dated October 21st, 1997, between the Town and the County. In a separate request we will request access to the capacity with Essex County for water/sewer.

The Zoning Administrator has asked about how this project will move forward if water and sewer are not provided to our site by either the County or Town. This issue is the subject of a separate application to the Board of Supervisors, and the applicant has demonstrated through significant evidence and analysis that the proposed development will not have an adverse impact on water and sewer systems.

7. [What is your financing structure; we need assistance understanding the structure? What methodology is being used to determine any restrictions?](#)

Financing structures for these types of developments are by their nature complicated. While we appreciate the desire to understand the intricacies of how this will come to fruition, it is not within the purview of the Zoning Administrator or County to take a position on our financing structure. As required by the Zoning Ordinance, we have provided a description regarding the impact of timing considerations and potential construction start date. The review of our current application and future applications should be based upon the recommendations and requirements of the Zoning Ordinance, Comprehensive Plan, and other County codes and policies.

Nevertheless, we can confirm that our lender has provided a letter stating support and confirmation that our submission is aligned with the requirements and priorities of the financing agency. As we stated, we have been diligently working with our lenders and investors and will be able to proceed after we have received our rezoning.

Management documents will outline the methodology for income qualification and our lender and investor will monitor for ongoing compliance.

8. [How will this community impact the Department of Social Services?](#)

Our application demonstrates that we will not have a negative impact on the Department of Social Services and their resources. As we will have minimal overlap based on income levels and anticipate likely no overlap because the minimum income level to afford the rent does not qualify for DSS services.

The proposed development will in fact have a demonstrably positive impact on the County based on the services and resources that can be brought to the County. Our plan is to provide wrap around services to not only the residents who live in our development but also to other residents of the County through local partnerships. It is our hope that the resources we are providing will assist individuals and/or families such that there will be a reduced need for services and burden on the Department of Social Services.

9. [Why should the county consider doing this concept on your land versus other parcels in the Town or County?](#)

In the 2015 Comprehensive Plan designated our land in the Development Service District. These areas are designated for the purpose of near-term development. To highlight a few of the goals and purposes for Development Service District in the Comprehensive Plan include:

- “Where growth can be most cost effectively supported”
- “Most suitable area for new population growth”
- “Existing or planned transportation system that can accommodate the movement of people and goods”
- “Sewer and water facilities that can service development at greater residential densities or can service industrial and commercial uses”
- “Where the County and Town will plan to provide infrastructure and will work with the development interests of the County to ensure provisions are met”
- “Where public benefits in the form of highway improvements, provision of affordable housing, provision of parks, provision for sites appropriate for construction of needed community facilities, are provided as part of the development approval process in exchange for higher densities.”
- “Higher residential densities or mixed use will be permitted only in such areas of the development district where infrastructure in the form of sewer, water, and transportation systems would not be adversely impacted or could be accommodated within a defined geographic cell”

10. [As a member of the Planning Commission and Board of Supervisors, how should I evaluate the re-zoning and site plan request?](#)

Decisionmakers should evaluate the present requests based upon the recommendations of the adopted Comprehensive Plan and Zoning Ordinance.

As stated in this document and throughout the applicant’s materials, the subject site is located within the Development Service District of the Comprehensive Plan. This plan area is designated for near-term development to allow for growth to be located in close proximity to the Town of Tappahannock and preserving the rural character of areas of the County located farther from the Town.

One of the specific recommendations for the Development Service District is that the Planned Unit Development (PUD) zone be used as a vehicle for this development. Indeed, the property’s existing B-1 zoning cannot accommodate the mixed-use nature of development called for by the Comprehensive Plan.

While there have been a number of questions from the staff related to ancillary questions about the site – such as the details of financing, why other site have not been chosen, etc. – those issues are not relevant to the review of the project in light of adopted County law and policy.

11. [How has the community reacted to Essex Point at Mt Clement?](#)

The community has been extremely enthusiastic about this coming to the County. It has been expressed that our vision and concept is exactly what the County needs. We are providing missing housing options, fitness space, childcare and learning facilities, and much needed community spaces. This will allow the County to grow and sustain in the long-term.

As of today, we have written letters of support from the YMCA of the Virginia Peninsulas, Essex County Economic Development Authority, Essex County School Superintendent, and Virginia Housing. Enclosed are those letters of support.

12. [What is the justification for Housing Revitalization Designation Area legislation?](#)

As outlined in our May 2nd narrative, we will request that the Board of Supervisors adopt the proposed resolution for Revitalization area.

However, this will be made through a separate request directly to the Board of Supervisors and separate from this application. The staff has expressed concern that this will require Comprehensive Plan amendment or affect Census Tracts. As previously communicated, this will NOT require Comprehensive Plan amendment nor affect any current or future designations. The legislation is a statutory requirement to finance mixed use, mixed income deals. The resolution is a “resolution is a statutory prerequisite for Virginia Housing to finance a mixed use, mixed income (MUMI) deal. Virginia Housing derives its legal authority to finance such transactions from § 36-55.30:2 of the Code of Virginia.” As stated in the code, the § 36-55.30:2.A of the VA Code states the Resolution is “[f]or the sole purpose of empowering the HDA to provide financing...”. Also, as outlined in the Virginia Housing’s qualified allocation plan (QAP) for awarding tax credits outlines the additional points for revitalization areas and the basis boot for 9% deals during the competitive process.

We appreciate your attention to these responses, and we look forward to hearings before the Planning Commission and Board of Supervisors.

the County from large scale development in areas where it is not prepared to provide services to support it. Moreover the results provide opportunity for clustering development particularly in the Countryside and Agricultural Preservation Districts and virtually assure large masses of open space are maintained over time. These open spaces will serve to maintain farmland in farm use or preserve sensitive lands and wooded areas to yield natural resource protection benefits over time.

Development Service District

The Development Service District generally corresponds to locations where growth can be most cost effectively supported within the planning period. The Development Service District contains roughly 3200 acres and surrounds the existing principal center of population, services and employment within Essex County. How development is managed in this district will be dependent on both the County and Town's relationship as they will guide growth in the area based on mutual decisions. It will be important for the County and Town to mutually determine how growth objectives may best be accommodated while protecting the qualities of rural character both currently enjoy.

The Development Service District comprises the most suitable areas for new population growth. Growth in these areas will prevent the outward sprawl of residential development into rural County areas, and keep the new population close to the existing centers where residents can be economically provided with utilities, services, and employment. In addition, the impact upon the County road system will be minimized due to the opportunity for location in close proximity to jobs and services.

These services include an existing or planned transportation system that can accommodate the movement of people and goods and sewer and water facilities that can service development at greater residential densities or can service industrial and commercial uses. The major advantage of the development district concept is to map in advance those areas where the County and Town will plan to provide infrastructure and will work with the development interests of the County to ensure provisions are met. In providing opportunities for development in these areas, the County can better achieve its resource protection and its agricultural preservation objectives by reducing pressures for development in areas dominated by farming activity or natural resources.

Current population and growth trends show no indication of significant growth for the Town or the County over the next decade, therefore current services are adequate to provide capacity for residents. In addition, the Town of Tappahannock in cooperation with the Middle Peninsula Planning District Commission has developed the 2005 Tappahannock Buildout Plan for residential development. Being that the Town has not reach the capacity outlined in the Buildout Plan and growth is moderate, expansion of higher density residential into the County is not necessary.

To improve the visual and functional qualities of development within the Development Service District, the County has revised its land use ordinances to establish performance standards for landscaping, control of access, lot coverage, and buffering from adjacent transportation corridors. Future commercial and industrial forms of development within this district on sites not presently zoned for such uses should be carefully evaluated to assure site characteristics permit these objectives to be achieved. The past linear form of commercial development, particularly along the Route 17/360 corridor, has not always enhanced the visual quality of development and has reduced the ability of major roads to serve through-traffic.

Future areas within the

Development Service District which may be designated for commercial or industrial development should be large in size (e.g. 10 to 15 acres) and should be located at intersections providing site frontage on at least two streets with adequate depth to provide space for service roads. Such sites can use the access provided by these streets and are adequate in size to house several uses with shared access, thereby minimizing outlets to the major road system. Their larger size permits sufficient land to accommodate landscaping between use and highways to enhance development visual qualities. Clustering of residential development should be encouraged within the development district to maintain open space. Such development, even when exclusively residential in nature, should be buffered

and separated by landscaping from major routes or adjacent incompatible land uses.

All portions of the Development Service District (DSD) are immediately adjacent to Tappahannock's corporate limits and include areas at Bray's Fork, areas east of Bray's Fork, toward the Rappahannock River and areas west of Bray's Fork along the 360 corridor.

Deferred Development Service District

The Deferred Development Service District is basically intended to facilitate future development beyond a 10 year time horizon. It is designated in the plan to protect its qualities so that it will be ready for a planned pattern of "town-scale" development in serviceable form. Designated rural residential or prematurely developed at non sewer and water densities, the Deferred Development District would essentially freeze future opportunities for growth in "serviceable" form as the Town Core expands. Some 5000 acres are designated as Deferred Development Service District.

Since the purpose of this district is the same as the Development Service District (DSD), much of the description of the DSD is equally applicable to this district. The chief distinctions between the two districts are their location relative to the town and anticipated time frames for development.

The County owned landfill property, about 700 acres, is included in the Deferred Development Service District. Development of this property is not planned for the near future; however, the availability of this large area of publicly owned property and the ability to provide water and sewer in the next two years could provide a site for an industrial area which requires a large area not available elsewhere.

Chesapeake Bay Preservation Areas

The objectives indicate that special emphasis should be placed on the preservation of sensitive resources. These resources are often located at or near waterfront areas of Essex County. Without a firm commitment to preserve the natural beauty and environment resources in these areas, the County could find this natural asset spoiled by intensive residential development. Such a commitment is further prompted by the shared objectives of the County and State of Virginia Chesapeake Bay Preservation Act in improved water quality of County tributaries to the Bay.

In keeping with these objectives:

- A high degree of restriction should be placed upon the use of all waterfront land that lies outside the Development Services Districts and Town and Rural Service Centers.
- These restrictions should take the form of low residential densities, and high levels of protection of sensitive resources and in keeping with the Chesapeake Bay Preservation Acts requirements.
- Strict Resource Protection Performance Standards for development in the areas designated should be established in Zoning, and Land Subdivision and Resource Protection Areas and Resource Management Areas (Both subparts of the Chesapeake Bay Preservation Areas of the County) and Site Plan requirements and regulations.
- Strong emphasis should be given to the provision of public assets to the waterfront including the establishment of Natural Parks.

Resource Protection Areas

Essex County has designated a RPA which consists of all tidal wetlands; nontidal wetlands, including impounded lakes and ponds connected by surface flow and contiguous to tidal wetlands or tributary streams; tidal shores; and an additional buffer area of 100 feet in width, except where reductions are

From: Shiree Monterio
Sent: Monday, April 17, 2023 9:02 AM
To: Shiree Monterio
Subject: Fwd: [EXT] PUD Rezone Review Request

Thank you,
Shiree Monterio
7 and M Development, LLC
www.7andM.com

Sent from my iPhone

Begin forwarded message:

From: Harry Thomas <hthomas@essex.k12.va.us>
Date: April 12, 2023 at 3:18:59 PM EDT
To: Rob Hodges <rhodges@essex-virginia.org>
Subject: Re: [EXT] PUD Rezone Review Request

Mr. Hodges,

I reviewed the rezoning request and preliminary site plan. This project will address an existing need for reasonably priced housing for prospective school division employees. I had the opportunity to meet with Ms. Monterio and she presented a compelling presentation about mixed use development, which has the potential for growth and further development for the county of Essex.

Sorry for the delay.

HT

On Tue, Mar 21, 2023 at 3:01 PM Rob Hodges <rhodges@essex-virginia.org> wrote:
Good Afternoon Everyone,

Below is a link to the PUD rezone files I previously sent to you requesting your input. The link will take you a page hosted on the county website where the files as listed individually instead of a single PDF document. Please let me know if you have any questions. Thank you.

<https://www.essex-virginia.org/planning/page/eyjafjallaj%C3%B6kull>



[Eyjafjallajökull](mailto:eyjafjallajokull@essex-virginia.org)

www.essex-virginia.org

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Dr. Harry R. Thomas III
Division Superintendent
Essex County Public Schools
Office: [804-443-4366](tel:8044434366)

A majority of the members of the Essex County Economic Development Authority support the proposed Mount Clement development project.¹ None have objected. We have been impressed by the developer's presentations to the EDA and recognize that the project would offer much-needed senior housing and affordable housing in our community. Moreover, the capital investment will generate jobs during the construction period (hopefully using local contractors) and, to a limited extent, when the housing and commercial development become operational. Provided that the entities owning the real property and the operations are for-profit businesses, the real estate tax revenue would enrich the county's coffers as well.

EDA member Ronnie Sidney has succinctly focused on the project's benefits. His comments warrant inclusion as part of the EDA's overall input on the project, and are attached as Exhibit A. Other EDA members have voiced support but have also suggested that the county examine the impact on county services and traffic.

Currently, Rt. 360 heading from the Brays Fork intersection toward Richmond presents challenges for drivers. The Rt. 360 and Hospital Road intersection is particularly hazardous. Some drivers turn quickly onto Hospital Road and others leaving Hospital Road find it difficult to safely cross the intersection for left turns onto Rt. 360. Any entrance to the Mount Clement project will increase the hazard level. Special attention will need to be given to the overall traffic situation in the area and appropriate turning lanes are critical. We note that virtually any development at Mount Clements could increase traffic levels. Given the demographics of the proposed plan's residents, the increase in traffic may be less than other possible uses of the property, such as a shopping center.

One board member asked about the ramifications of the entrance and roads being held privately. What does that mean for access to commercial facilities in the development? Is 32% less parking than is typically required for the number of dwellings sufficient to meet the residents and commercial tenants needs?

As we understand it from the developers and from our own due diligence, there is adequate water supply and wastewater treatment from the Town of Tappahannock to support the project. We would be interested to know the cost to the county to provide the connections as requested by the developers.

We encourage the county to carefully examine the demands that low-income seniors could place on Essex County, particularly the Department of Social Services. Already 38% of the county's residents depend on government assistance. Moreover, increasing the county's low-income population could become a deterrent to attracting new businesses. Perhaps a larger mix of market-based rents versus subsidized rents could lessen the impact. Also, the county might consider requiring a percentage of both the senior renters and non-senior renters to be residents of Essex County or employed within the county.

¹ EDA Board Member Tim Smith recused himself from commenting on the proposal given the potential conflict of interest between his work for the Essex County Zoning Department which is reviewing the plan.

We urge the county to undertake its own cost-benefit analysis to determine whether to approve the re-zoning classification request but also to give added weight to the social benefit of increasing the supply of affordable housing for seniors and workers.

The EDA appreciates the opportunity to comment on the project.

Respectfully submitted by,

Lisa S. Andrews, Chair
Essex County Economic Development Authority
April 4, 2023

Exhibit A

Comments of EDA Member Ronnie Sidney

I was very impressed by Shiree Monterio CEO and Founder 7 and M Development, LLC, presentation to the Economic Development Authority several months ago. The materials I have reviewed regarding the potential project are very thorough and well organized. It is empowering to see a young women lead such a robust project that has the potential to bring housing, jobs, and opportunities to our town and region. I am very familiar with the Harris family. They have played a critical role in providing services and jobs to the community for several generations.

I am excited about the project, particularly the housing opportunities it brings to the region. Housing for seniors is in dire need across the region and state. The proximity to medical services is essential to the prolonging of life of residents. Providing one- and two-bedroom housing options to workers is also very important. My mother-in-law rents out a few trailers throughout the county and people reach out to me all the time about availability. Unfortunately, all her units are full, along with many other individuals in the community who rent homes out to members of our community.

I am also interested in the non-residential office units made available by the project. That would enhance the services brought to the region by VCU medical center and other medical agencies interested in coming to the region. The community desperately needs a gym and would love to see a YMCA come to the town. An increased population, expanded tax base, and new businesses will help spur economic development and growth in the county and region.

The economic impact of the proposed plan also interests me. According to the economic impact study, during the construction phase, 361 direct jobs will be supported, and the total financial impact is estimated at \$45,356, 931. Our county will also benefit from the approximately \$1,169,829 in total taxes generated at the local level. Once the project is fully functional, the project will support approximately 40 indirect and induced jobs, with a recurring annual impact of \$7,476,733.

It was explained this is the first phase of the project and I am in full support of it. I request the community, region, and state assist Shiree and her company with the appropriate infrastructure and support to bring this project into fruition. It will benefit the lives of thousands of people. This project will be an economic engine and help enhance our town, county and region.

Ronnie Sidney, II, LCSW



VIRGINIA HOUSING ALLIANCE

Bryan Ailey
People, Inc.

Orlando Artze
Orlando Artze Consulting

Melissa Bondi
*Enterprise Community
Partners, Inc.*

Mike Chiappa
*Arlington Partnership for
Affordable Housing*

Kelly Evans
*Institute for Public Health
Innovation*

Lisa FaJohn
Dominion Energy

Jay Grant
LISC Hampton Roads

Erik Hoffman
Klein Hornig LLP

Chandra Hurst
Virginia Community Capital

Monica Jefferson
At Large

Pam Kestner
*LeSar Development
Consulting*

Valerie Liggins Cameron
Foundation

Sunshine Mathon
Piedmont Housing Alliance

Joy Myers
*Doorways for Women and
Families*

Lane Pearson
*Mark Fleckenstein &
Associates, P.C.*

Madelyn Peay
*Richmond Metro Habitat for
Humanity*

May 17, 2023

Rob Hodges
Essex County Planning and Zoning Administrator
Plats Officer/ Subdivision Agent
202 South Church Lane
P.O. Box 549
Tappahannock, VA 22560
(804) 443-4329

Mr. Hodges,

The Virginia Housing Alliance (VHA) is writing to express our support for the Essex Point at Mt. Clement development project as proposed by 7 and M Virginia, LLC. VHA is a statewide education and advocacy organization dedicated to expanding affordable housing opportunities throughout the Commonwealth. We believe that this development project will greatly benefit the residents of Essex County by addressing the critical need for workforce housing and inviting further economic investment to the community.

Research indicates that one of the main challenges facing rural areas in Virginia is the lack of affordable housing for older adults and for the many people who work in essential service jobs such as teachers, firefighters, and nurses. With limited senior housing options, those who age in rural communities often find themselves increasingly isolated from caregivers, health care services, and other amenities. In addition, the shortage of affordable housing creates significant hardship for members of the workforce. VHA's member organizations in rural communities have repeatedly expressed the need for affordable rental housing to attract economic investment, prevent population decline, and to better care for the elderly and those with disabilities.

The Essex Point at Mt Clement project will help address these issues by providing affordable workforce and senior housing with access to wellness spaces, a community center, and excellent healthcare services nearby. In addition, the commercial spaces included in the mixed-use development offer opportunities for economic growth and strengthen community engagement.

The project will be financed in part through the Low-Income Housing Tax Credit (LIHTC) program, which was created during the Reagan administration to incentivize the construction and rehabilitation of affordable housing across the country. The program has a long history of success, and its positive impacts have been felt by millions of Americans. Numerous research studies have found that properties financed through LIHTC contribute to social, economic, health, and educational benefits for communities and families, as well as reduced homelessness. Furthermore, researchers report that LIHTC developments have been found to increase neighboring home prices and lower crime rates.

The LIHTC program includes stringent annual compliance procedures to ensure that all developments are well managed and continue to meet requirements. Importantly, private sector tax credit investors, often banks or other financial institutions, oversee compliance with the program and the quality of the property.

In 2022, Virginia created a similar state tax credit program, the Housing Opportunity Tax Credit, with a special carve-out for development in rural communities. The Essex Point at Mt Clement project will potentially be eligible to use this resource to help the program meet its goals for rural areas like Tappahannock. Further, we believe this project clearly aligns with Governor Youngkin's "Make Virginia Home Plan," which calls for the integration of housing and workforce development initiatives.

In conclusion, we urge you to support this important development proposal as it is a vital step towards meeting the housing and economic development needs of Essex County.

Thank you for your attention to this important matter.

Sincerely,



Brian Koziol
Executive Director
Virginia Housing Alliance



April 27, 2023

Mr. Rob Hodges
Essex County Planning and Zoning Administrator
202 South Church Lane
P.O. Box 549
Tappahannock, VA 22560

Dear Mr. Hodges:

RE: Essex Point

I am writing to express our interest in the proposed mixed-use development known as Essex Point at Mount Clement. We have had detailed discussions with Ms. Shiree Monterio on proposed financing scenarios that involve both taxable and tax-exempt bond fundings as well as the issuance of tax credits. This proposal does align with certain strategic priorities of Virginia Housing, and we are interested in continuing these conversations.

I hope that the County will see the same potential as we do with Essex Point.

Respectfully,

A handwritten signature in blue ink that reads "E. Bennet Atwill".

E. Bennet Atwill
Business Development Manager



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

YMCA LEADERSHIP

February 20, 2023

LaMonte Williams, Chief Volunteer Officer

John O'Shaughnessy, Vice-Chair

Don Buckless, Treasurer

Eric Claville, Secretary

Shiree Monterio
CEO and Founder
7 and M Virginia LLC
26263 Tidewater Trail
Tappahannock, VA 22560

Adam Klutts, President / Chief Executive Officer

Skip Ferebee, Sr. VP/Chief Strategy Officer

Davetta Rinehart, Sr. VP/Chief HR Officer

To Ms. Monterio,

For a YMCA directory please dial

757 247 9622

CAMP KEKOKA YMCA

FIRST TEE OF THE VIRGINIA PENINSULA

FORT MONROE YMCA

GREATER WEST POINT FAMILY YMCA

HAMPTON FAMILY YMCA

LUTER FAMILY YMCA

MATHEWS FAMILY YMCA

MIDDLESEX FAMILY YMCA

NORTHERN NECK FAMILY YMCA

NORTHUMBERLAND FAMILY YMCA

R.F. WILKINSON FAMILY YMCA

RICHMOND COUNTY FAMILY YMCA

TOM & ANN HUNNICUTT FAMILY YMCA

VICTORY FAMILY YMCA

WESTMORELAND FAMILY YMCA

YMCA HEALTH & WELLNESS CENTER

I am pleased to write in support of and express our interest in the development of Essex Point at Mt Clement in Essex County, Virginia by 7 and M Virginia LLC (7 and M).

The YMCA of the Virginia Peninsulas is a cause-driven charity strengthening communities on the Virginia peninsulas for over 126 years through youth development, healthy living, and social responsibility. Across the Association, 18 facilities engage 50,000+ men, women, and children — regardless of age, income, or background — to nurture the potential of children and teens, improve our community's health and well-being, and provide opportunities to give back and support neighbors. The Peninsula Y has long-standing relationships and physical presence not just to promise but to deliver lasting personal and social change.

Our expression of interest is not a commitment nor binding but as an organization, we wanted to express the feasibility of YMCA of the Virginia Peninsulas being an anchor tenant in this community. I provide this letter of support enthusiastically and without reservation. We look forward to continuing our discovery efforts to be a part of this exciting project. You may contact Skip Ferebee at 757-223-7923 or should you have any questions.

Thank you,



YMCA OF THE VIRGINIA PENINSULAS • 41-C Old Oyster Point Road • Newport News, Virginia
23602 757-223-7925 • fax: 757-223-7926 • e-mail: info@peninsulaymca.org
www.ymcavp.org

YMCA Mission: To put Christian principles into practice through programs that build healthy spirit, mind, and body for all.



GOVERNOR OF VIRGINIA

Glenn Youngkin

STRENGTHEN THE SPIRIT OF VIRGINIA

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For Immediate Release: November 18, 2022

Contacts: Office of the Governor: Macaulay Porter, Macaulay.Porter@governor.virginia.gov

Governor Glenn Youngkin Unveils the “Make Virginia Home” Plan

RICHMOND, VA — Today at the 2022 Virginia Governor's Housing Conference, Governor Glenn Youngkin unveiled his “Make Virginia Home” Plan, which will promote increasing the supply of attainable, affordable, and accessible housing across the Commonwealth.

“After listening directly from Virginians on the various housing issues across our Commonwealth, my administration created the ‘Make Virginia Home’ plan. It is designed to address the restrictions on housing supply, improve and streamline permitting processes, and protect property owner rights. For far too long, Virginians have faced unnecessary burdens that have limited their housing options and opportunities. Today’s plan is a needed step to improve housing options and keeps my commitment to lower the cost of living and make Virginia the best place to live, work, and raise a family,” **said Governor Glenn Youngkin.**

“During our efforts to attract and retain businesses to Virginia, the availability of workforce housing for their future employees was consistently raised by employers. It’s clear there is a strong connection between economic growth and needs for attainable housing options. This plan will align housing development with economic growth as part of our site development process and we will engage with site selectors earlier in the recruitment process on housing to ensure workforce housing needs are addressed,” **said Secretary of Commerce and Trade Caren Merrick.**

The **MAKE VIRGINIA HOME PLAN** will focus on several key areas to increase accessibility, affordability, and attainable housing in the Commonwealth:

Increasing the supply of land for housing

- Create reasonable **linkages** between **discretionary state grant funding** to localities and **local policies and actions that encourage housing** growth through executive action or statute
- Establish guard rails for zoning/land use review processes that include deadlines by which localities must act, and consequences if they do not, for localities seeking state assistance to increase the growth of their economies
- Create transparency by requiring localities to report on their policies and actions that impact housing development
- Investigate comprehensive reforms of Virginia’s land use and zoning laws

Remove regulatory barriers to housing development

- Provide a **more efficient way** for public and private economic development and infrastructure projects to **meet mandated wetlands and stream mitigation requirements** in a way that does not jeopardize the quality of that mitigation by working to operationalize Virginia’s existing Wetland and Stream Replacement Fund.
- Continue to improve and streamline environmental permitting processes.
- Translate Virginia’s building regulations into Spanish
- Investigate potential procedural changes in the building code adoption process that balances technical code provisions more closely with construction cost controls.

Align housing development with economic growth

- Housing is prominently included in the Commonwealth’s economic development planning and site development process.
- Establish public/private partnerships with site selectors early on to include workforce housing in the site development and selection process.

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COMMONWEALTH of VIRGINIA

DEPARTMENT OF TRANSPORTATION

87 Deacon Road
Fredericksburg, Virginia 22405

Stephen C. Brich, P.E.
COMMISSIONER

May 15, 2023

Essex County Planning & Zoning
Attn: Rob Hodges

Re: Essex Point @ Mount Clements
2nd Rezoning TIA & Preliminary Plan Reviews
Essex County, Rt. 360

Dear Mr. Hodges:

This office has reviewed the referenced traffic impact analysis (Dated 3-5-2023) and preliminary plan (Dated 5-3-2023) in accordance with the minimum standards as received on May 8, 2023, and we have noted that the previous comments have been addressed. Therefore, the Department has no objections to the approval of this application. Should you have any questions concerning the plan review, contact Chad Brooks directly at (804) 761-2148.

Sincerely,

Robert Butler

Robert Butler, P.E.
Asst. Resident Engineer-Land Use

Cc: Wells & Associates, William Johnson, P.E.
Timmons Group, Craig Kotarski, P.E.
VDOT, Peter Hedrich, P.E.
VDOT, Lee McKnight