Plan for
Ladysmith Village

Retirement Community
The following plan for a retirement community within Ladysmith Village has been prepared for Ladysmith Land, LLC. The plan was developed as a Studio II project for the Masters of Urban and Regional Planning program at Virginia Commonwealth University. The plan was prepared and presented on April 28, 2006 by Angeline Marsh.

Panel:

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Table of Contents

- Executive Summary & Vision Statement
- Caroline County
- Current Developments
- Ladysmith Village
- Retirement Housing
- Design Alternatives
- Ladysmith Village Retirement Community
- Goals & Objectives for the Retirement Community
- Plan for the Community
  - Residents
  - Amenities
  - Streetscape
  - Transportation
  - Community Design
  - House Design
  - Layout
  - Restrictions
- Appendices
Executive Summary

The following is a concept plan for the Retirement Community of Ladysmith Village in Caroline County, Virginia. Caroline County is a growing county that has become highly attractive to people looking for a more rural area in which to live. Caroline County has the optimal mix of rural character and modern convenience. The county is along the Interstate 95 corridor with easy access to Washington, D.C., the Richmond metropolitan area, and the Fredericksburg metropolitan area. In addition to historical and cultural resources, there are several recreational resources also within close proximity.

Ladysmith Village is less than a mile from Interstate 95 and has easy access to many of the amenities of the larger surrounding communities. With further development of the Village and the Retirement Community, additional amenities will be available to incoming residents. These amenities include a nearby golf course, medical services and transportation, commercial and retail opportunities and additional recreational amenities.

The following plan outlines all amenities for the full service retirement community that include an active adult section, an assisted care facility, a long term care facility, commercial components and a community center. Design alternatives are discussed and one option in particular is recommended. This plan expounds upon the implementation of a retirement community in a Traditional Neighborhood Design development. The Ladysmith Village Retirement Community will be designed to separate the active adult and assisted care and long term care facilities, but retain the feeling of an integrated TND development.

For the purposes of this plan, the market for such a community in the Ladysmith has been assumed and is based upon a market study conducted for Ladysmith Village. Caroline County is not the main market draw for the Ladysmith Village Retirement Community. The surrounding localities to the north and south of Caroline County, which are further discussed in the plan, are the main drawing areas for this community.

Vision

Ladysmith Village Retirement Community is a community for residents over 55 years of age. The community allows for residents to remain in their communities as they grow older and receive the care they need. The Retirement Community is an active, health conscious neighborhood designed for those over 55 years of age with walking trails along South River, fitness centers, game rooms, transportation to and from surrounding areas and health care services designed to nurture residents as they age.
Caroline County

Caroline County is located in central Virginia thirty-five miles north of the capitol of Virginia, Richmond, and approximately seventy-five miles south of the nation’s capitol, Washington, D.C. Caroline County covers 549 square miles and is a predominantly rural county and is home to just over 22,000 people (according to the 2000 Census).

Population increased in recent years from 19,217 to 22,121 (1990 to 2000), and building permits issued for housing units has increased as well. Figure 1 shows the number of permits issued for different housing types since 1999 in Caroline County. As seen in Figure 1, building permits issued for single-family dwellings has dramatically increased from 113 in 1999 to 572 in 2005. From January through March of 2006 117 permits for single family dwellings were issued, more than were issued in all of 1999. These increases indicate a thriving housing market within the county.

![Building Permits in Caroline County](image)

Figure 1: Permits issued in Caroline County from 1999 through March 2006

Figure 2 shows that although permits issued have increased, a majority, 54%, of the 8,889 structures within Caroline County were built between 1970 and 1994 (according to the 2000 Census). The median year built for structures in the county is 1978. Likewise, Figure 3 illustrates the number of structures

Ladysmith Village Retirement Community 5
built since 1939 or earlier by owner-occupied structures. Fifty-seven percent of owner-occupied units were built between 1970 and 1994.
While the population in Caroline County is steadily rising and from the latest estimate is around 25,000, most of the surrounding localities greatly outnumber Caroline County in population. Figure 4 shows the populations of the surrounding localities of Hanover, Henrico, Prince William, Spotsylvania and Stafford Counties and the cities of Fredericksburg and Richmond (market area). According to the 2000 Census, all but one (Fredericksburg City) of the surrounding localities referenced outnumber Caroline County’s 22,121 residents. Figure 4 does not, however, take into account the size of each locality in the population estimates. The assumption is that localities with a larger area naturally have the potential for larger populations. The population, regardless of the size of the locality, in the surrounding jurisdictions is important due to the fact that, based on developer records, many incoming residents are from the surrounding localities.

![Total Population in Surrounding Localities](image)

**Figure 4:** Population of Surrounding Localities from 2000 Census

A lower population in Caroline County helps to retain the rural character of the area. However, the population in Caroline County is projected by the Department of Planning and Community Development to grow by over 10,000 residents by the year 2010, increase by almost 34,000 residents in 2020 and by an estimated 51,795 by the year 2030. These calculations are based upon proposed dwelling units within approved projects, by-right subdivisions at a rate of 80 units per year, and miscellaneous rezonings and subdivisions throughout the County.
Table 1 shows the breakdown of population by age within Caroline County from the 2000 Census. This table shows that a majority of the residents in Caroline County are under the age of 60 years of age and that the County is evenly spread between the ages of “Under 9 Years” to “50 to 59 Years”. This implies that a substantial portion of the population will be aging in the coming years and will be ideal residents for the Ladysmith Village Retirement Community.

As Table 2 shows, the age ranges have not drastically changed since 1990. While the County gained almost 3,000 residents between 1990 and 2000, the dispersion of ages remained relatively equal. The changes that occurred are in the higher age ranges where there was a decrease in the percent of the older population in 2000 from 1990, while the number of residents within the younger age ranges became more evenly dispersed. Table 2 shows the whole numbers of the population and percentages of age ranges in 1990 that can be compared to those in 2000. Overall from 1990 to 2000, the younger age ranges have increased in percent, while the older population percentages have remained almost the same.

Table 3 shows the percent change of those age categories over the age of 40, residents eligible to live in the Ladysmith Village Retirement Community. For the total population over the age of forty, there was a 26% increase. The change in the age ranges is most likely caused by both the addition of almost 3,000 residents and the aging of the existing population. This means that the population in Caroline County with potential to reside in the Ladysmith Village Retirement Community is growing. Most of the growth occurred with residents between the ages of 40 and 59, leading to a continued aging population possibly looking for an active retirement community.

While the median age of the Caroline County residents is 37.7 years of age, according to the 2000 Census, almost half of County residents are at least 40 years of age (46.1%). As stated before, the first table shows the fact that almost half of current Caroline County residents are eligible to be residents in the Ladysmith Village Retirement Community.
<table>
<thead>
<tr>
<th>Age</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population</td>
<td>22,121</td>
<td>100%</td>
</tr>
<tr>
<td>Under 9 Years</td>
<td>2,940</td>
<td>13.3%</td>
</tr>
<tr>
<td>10 to 19 Years</td>
<td>3,026</td>
<td>13.7%</td>
</tr>
<tr>
<td>20 to 29 Years</td>
<td>2,461</td>
<td>11.1%</td>
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<tr>
<td>30 to 39 Years</td>
<td>3,487</td>
<td>15.8%</td>
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<td>40 to 49 Years</td>
<td>3,406</td>
<td>15.4%</td>
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<td>50 to 59 Years</td>
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<td>13.2%</td>
</tr>
<tr>
<td>60 to 69 Years</td>
<td>1,859</td>
<td>8.4%</td>
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<tr>
<td>70 to 79 Years</td>
<td>1,360</td>
<td>6.1%</td>
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<td>80 to 89 Years</td>
<td>550</td>
<td>2.5%</td>
</tr>
<tr>
<td>Over 90 Years</td>
<td>116</td>
<td>0.5%</td>
</tr>
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Table 1: Population in Caroline County by Age from 2000 Census

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<thead>
<tr>
<th>Age</th>
<th>Number</th>
<th>Percent</th>
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</thead>
<tbody>
<tr>
<td>Total Population</td>
<td>19,217</td>
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<tr>
<td>9 Years and Under</td>
<td>2,832</td>
<td>14.7%</td>
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<tr>
<td>10 to 19 Years</td>
<td>2,734</td>
<td>14.2%</td>
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<td>60 to 69 Years</td>
<td>1,697</td>
<td>8.8%</td>
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<td>70 to 79 Years</td>
<td>974</td>
<td>5.1%</td>
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<td>80 to 84 Years</td>
<td>284</td>
<td>1.5%</td>
</tr>
<tr>
<td>85 Years and Over</td>
<td>199</td>
<td>1.0%</td>
</tr>
</tbody>
</table>

Table 2: Population in Caroline County by Age from 1990 Census
<table>
<thead>
<tr>
<th>Age</th>
<th>2000</th>
<th>1990</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population</td>
<td>10,207</td>
<td>7,527</td>
<td>26.8</td>
</tr>
<tr>
<td>over 40 Years of Age</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>40 to 44 Years</td>
<td>1,816</td>
<td>1,335</td>
<td>4.81</td>
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<tr>
<td>45 to 49 Years</td>
<td>1,590</td>
<td>1,239</td>
<td>3.51</td>
</tr>
<tr>
<td>50 to 54 Years</td>
<td>1,598</td>
<td>937</td>
<td>6.61</td>
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<td>55 to 59 Years</td>
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<td>60 to 64 Years</td>
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<td>65 to 69 Years</td>
<td>831</td>
<td>815</td>
<td>0.16</td>
</tr>
<tr>
<td>70 to 74 Years</td>
<td>738</td>
<td>568</td>
<td>1.70</td>
</tr>
<tr>
<td>75 to 79 Years</td>
<td>622</td>
<td>406</td>
<td>2.16</td>
</tr>
<tr>
<td>80 to 84 Years</td>
<td>338</td>
<td>284</td>
<td>0.54</td>
</tr>
<tr>
<td>Over 85 Years</td>
<td>328</td>
<td>199</td>
<td>1.29</td>
</tr>
</tbody>
</table>

Table 3: Percent Change in Population over 40 Years of Age between 1990 and 2000

The population over 40 years of age in surrounding localities is also an important factor because of the potential draw of residents into Caroline County from these areas. Table 4 details the population over 40 years of age, as well as the population over 55 years of age (the age restriction for at least one member of each household in the Retirement Community) for the surrounding localities. The lowest percent of residents over 40 years of age is in Stafford County with only 36.5% of its total population over 40 and only 13% over the age of 55. None of the surrounding localities have as high a percent of residents over the age of 40 as Caroline County with 46%. There are, however, three localities (Richmond City, Hanover and Henrico Counties) with over 40% of their population over the age of 40. These numbers indicate a large potential market now and in the coming years for the Retirement Community.

Household income is an important aspect of any new development. The median household income in Caroline County is $39,845. Median income in the surrounding localities varies between $31,121 in Richmond City and $66,809 in Stafford County. Figure 5 shows the differences in median incomes in the area, while Figure 6 uses the percent of households in each income bracket for all of the localities to show the income distributions. Incomes are important to show that income levels in the surrounding areas are higher and incoming residents have the ability to support the amenities of the community and surrounding area.
Over half (56.3%) of the households sampled in Caroline County in the 2000 Census have a household income between $0 and $44,999. Just over one third (31.8%) of households in Caroline County have an income between $50,000 and $99,999. A marginal 7.1% of households have an income over $100,000 in the county. By far, Caroline County has fewer households with higher incomes compared to surrounding localities. However, Caroline County has fewer households within the lower income brackets than both Richmond and Fredericksburg Cities. Stafford County has the highest percent of households with incomes over $50,000 (more than two thirds of the total households), followed by Prince William County with 66.4% of the total County households having an income over $50,000. Spotsylvania and Hanover Counties also have a high number of households with over 50% of the total households in each county having incomes over $50,000.

![Household Income in 1999](image)

**Figure 6**: Percent of total households within each income bracket in 1999
In respect to retirement communities it is not only important to look at household income, but also to investigate household receipt of Social Security and retirement incomes. Figure 7 shows the percent of households with and without social security income in 1999 in the subject localities. Figure 7 reveals that Prince William and Stafford Counties have the greatest percentage of households without Social Security income. Caroline County has the greatest percent of households with Social Security income with almost 30% of households receiving Social Security.

Much like the use of Social Security, retirement income is an important factor in retirement community development. Figure 8 shows, much like Figure 7, that the percent of total households with retirement income in all the localities is relatively even (with a maximum of a 3.2% difference between highest percent and lowest percent of households with retirement income). Fredericksburg and Richmond cities have the fewest households with retirement income. Though Caroline County does not have the highest percent of households with retirement income, it does have the second highest percent of households with retirement income (Stafford County has the highest). In all eight localities, over 80% of the total households are without retirement income as of 1999.

Figures 7 and 8 do not take into account the household age in figuring social security and retirement incomes within the county. Based on the assumption that all of the households receiving social security and retirement incomes are over the age of 55, then there is a high percent of households receiving social security and about half of those households headed by someone over the age of 55 are receiving retirement income. If all households receiving retirement income have a householder over the age of 55, then almost 49% of the 3,133 households are receiving retirement income. Additionally, based on the previous assumption, over 75% of those households are receiving social security income. This is most likely not a correct percent because it does not take into account those households with householders under 55 years of age that are receiving social security income. However this is a better estimate of the households receiving supplemental income.

Social Security and retirement incomes are important aspects to investigate for a retirement community because receipt of one or both types of supplemental income can imply a limited and/or fixed income for residents.
Figure 7: Social Security Income in 1999 for Caroline County and surrounding localities

Figure 8: Retirement Income in 1999 for Caroline County and surrounding localities
Transportation

Two major access routes and several other smaller routes serve Caroline County. Interstate 95 and Route 1 traverse the western side of the County and travel south to north. Routes 2, 17 and 301 traverse the eastern side of Caroline County. Map 1 shows the County and the surrounding area and Map 2 shows in more detail the road systems in the County. While the County does not have a transportation system of its own, the FREDericksburg Regional Transit (FRED), a bus shuttle from Fredericksburg serves Caroline County, and carries passengers from Caroline north to the Fredericksburg area. This allows County residents access to shops and services (including major medical services) not readily available in Caroline.

A large portion of the northern section of Caroline County is owned by the Federal Government and operated by the Army. Fort A.P. Hill, as seen on Map 2, is a 77,000-acre section of the county that will not be available for development while in operation. Most of Caroline County is residential, a majority of which is zoned rural preservation and requires ten-acre minimum lot sizes for subdivision. Pods of business and industrial uses exist around the county with additional pods under construction and still more planned with coming development. Major pods of business and commercial uses are

Ladysmith Village Retirement Community 16
concentrated in the Town of Bowling Green, Ladysmith, Carmel Church (close to Interstate 95), and the Town of Port Royal. Commercial and retail services are mostly located along the major transportation corridors (Route 1, Route 639, Route 207 and Route 301).
Map 2: Caroline County with the transportation network
Environment

Caroline County is a part of the Chesapeake Bay Preservation Area covered by the Chesapeake Bay Act. This designation carries with it many regulations and restrictions pertaining to development. The Bay Act identifies both Resource Management Areas (RMA) and Resource Protection Areas (RPA). The RPA carry specific regulations that require a 100 foot undisturbed buffer around the water or associated wetlands. Additionally, Caroline County is within the Chesapeake Bay Watershed. The watershed has an average land cover of 16% (meaning that the average impervious land cover in the county is 16%). The implications of the Watershed for developments are that any development that includes impervious surfaces over 16% are required to implement water quality measures to mitigate for the increase in land cover values.

Current Developments

There are currently six large developments within Caroline County that are in varying stages of development: Belmont at Carmel Church, Brookwood, Haymount, Ladysmith Village, Pendleton and South River. The locations of four (Belmont, Haymount, Ladysmith Village and Pendleton) of the six major developments can be seen in Map 3. With the exception of Haymount, which is in the northern section of the county, most of the major developments in Caroline County are located within the western quadrant of the county.

Haymount, Ladysmith Village, Pendleton and South River are all Traditional Neighborhood Design (TND) concepts, while Belmont and Brookwood are designed in a Conventional Neighborhood Design. The idea behind TNDs is to create a neighborhood and a community where residents have the opportunity walk to work, to different restaurants, shops and services and co-exist with people of varying incomes and backgrounds. This is in contrast to a Conventional Neighborhood Design, which includes, almost exclusively, single family homes and is oriented more toward the vehicle than the pedestrian. Conventional designs do not include mixed use development and rarely have multi-family units within the overall neighborhood. Typically, the lots are also larger than those found in Traditional Neighborhood Design developments and include larger rear yards.

Belmont at Carmel Church is a Conventional Neighborhood Design development near exit 104 off Interstate 95. Although it is slated to include a commercial component with a grocery store, pharmacy and office space, it still conforms to the Conventional standards of larger lots and less pedestrian oriented design. Haymount is located in the northern section of the County adjacent to the Rappahannock River along Route 17. It is designed to be a new town, including a school, emergency services buildings, post office, commercial components, community gardens, recreational facilities and a variety of housing types. Pendleton is a residential development that includes an 18-hole
golf course, single-family homes, townhouses and a commercial component, which is to include a restaurant. South River development is adjacent to Ladysmith Village and, in addition to the single-family homes in the development, will include an elementary school to replace the current Ladysmith Elementary School.

Of these major developments throughout Caroline County, only one (Pendleton) will include a retirement or age-restricted component. Pendleton will include an age-restricted component within the overall development, though it is not yet designed. While these developments will increase the overall number of households in the county, bringing in new potential retirement-age residents, there is currently no development in Caroline County to accommodate a retirement lifestyle.

Empty nesters and young professionals are conventionally the target market for Traditional Neighborhood Design developments and with the increase in TND type developments in the County, the number of empty nest households and retirement age households will continue to increase. Retirement Community residents are a benefit to the locality in which they live. In addition to adding to the overall population and tax base for a locality, these residents do not have as high an impact on public utilities such as roads and schools. Additionally, retirees (or those within the Retirement Community) tend to be more health conscious and are less of a burden on fire and rescue services. Since many residents in retirement communities are retired, they have more time for volunteering. As volunteers they tend to work for local organizations, clubs, schools and libraries. Volunteers also lessen the impact on a locality by reducing the need, in some cases, for salaried employees.

The creation of such a facility would be the first of its kind within the County. Based upon resident comment it can be noted that many county residents were born in the county, grew up in the county and do not wish to move out of Caroline County. Thus, an age restricted community within the county would give those residents the opportunity to remain close to family and friends and not leave their churches, civic groups and other organizations. Sample data from the 2000 Census in Table 10 shows the tendency for people to remain in the same house. In 2000, over 67% of residents sampled (over 90% of the total population) were still in the same house in which they resided in 1995. The percent of the population in 2000 still in the same house from 1995 is higher than the state average, as seen in Table 8. This implies that Caroline County residents have a higher potential to remain in their homes than the overall state. The tendency for residents in the county to stay in the county also implies a potential market for the Retirement Community, even though the main draw is not assumed to be from within Caroline County.
An important factor in creating restrictions for a retirement community is the presence of grandparent headed households. A restriction on the presence of children can discourage and limit potential residents. Another aspect is households with adults caring for their parents. In this case, the adult children may not be able (due to age restrictions) to live in the retirement community, but the parents would be eligible to reside in the assisted living or continuing care facility. With these components, the elderly do not have to leave their community and the children are not constantly caring for their parents. Figure 9 shows a breakdown of family types by the percent of family households with grandchildren and parents in Caroline County, as well as the surrounding jurisdictions.
As seen in Figure 9, 4.6% of the 19,067 family households in Caroline County include grandchildren. Of the 19,067 family households less than 1% are comprised of adult children caring for their parents. These statistics imply that it is rare to have households headed by grandparents or adult children caring for parents within Caroline County. Only Richmond City has a greater presence of grandchildren than Caroline County, but still not above five percent of the total family households have grandchildren present. This indicates that there will not be many potential residents impacted or deterred by a restriction on the length of time in which children can be present in the community.
Map 3: Caroline County Development Map showing the location of four of the six major developments in the County, growth boundaries, and future land use as shown in the Comprehensive Plan.
Ladysmith Village and Surrounding Area

The next phase of development for Ladysmith Village is the inclusion of a retirement community within the overall Village. The Village is based on Traditional Neighborhood Design concepts made famous by Andres Duany and Elizabeth Plater-Zybek. A market study for the overall Ladysmith Village community, included in Appendix E, was conducted prior to the implementation of the Village. Ladysmith Village is being built in various phases and includes a YMCA, a library and an elementary school for Caroline County. Also associated with Ladysmith Village is Ladysmith Commons, an office/commercial component.

The Village is on the west side of Caroline County along Route 1 and only a mile from Interstate 95, as shown on Map 3. Within close proximity to Ladysmith Village (in addition to South River and Pendleton) are Lake Caroline Resort Community, Lake Land ‘Or Resort Community and Bridlewood. The two lake communities are well established, platted in the 1960s as vacation communities and currently used more for year-round living. Campbells Creek Village was also platted in the 1960s and is a conventional neighborhood design. Directly adjacent to the project property is Bridlewood is a newer development, also constructed in a conventional neighborhood pattern with larger lots. A majority of the surrounding land is designated for residential development.

On the eastern side of Route 1 is commercial development including a shopping center with a Food Lion grocery store, Domino’s Pizza, Subway, nail salon, video rental, an ABC store, insurance company, Chinese restaurant and a few unoccupied units. Also in close proximity to the development, along Ladysmith Road (Route 639), are self storage units and multiple commercial and retail buildings, including a dentist office, daycare, hair salon and Guiseppe’s Restaurant. Currently under construction is the additional commercial site north of Ladysmith Village on Route 1. As previously mentioned, Ladysmith Commons will include office and commercial space, as well as restaurant space.

Map 4 shows the Future Land Use in the Ladysmith area as designated by the Caroline County Comprehensive Plan. The areas shown as “Planned Development” are also called Planned Mixed Use Development (PMUD). These areas, with the exception of the small area in the south of the growth area, are where Ladysmith Village (the northern section) and Pendleton are located.

Ladysmith Village encompasses approximately 550 acres of land, (Appendix A) rezoned in January 2003 to Planned Mixed Use Development (PMUD), which allows for a TND development, with an additional 300 acres of land designated as “Future Development” as shown in the map on page 40. The first step in
constructing a retirement community is to amend the Ladysmith Village proffers to allow for such a community. Ladysmith Village Sections 1A, 1B and 2 are currently under construction. Within these sections are single-family homes, townhouses, a library, apartments and live work units. Ladysmith Village alone will be built out over 10 years, initially slated for completion in 2015 with a total of 2,850 housing units (a detail of the proposed unit types by number and percent is shown in Table 9). Table 9 shows that the original concept for the development encompasses a relatively even spread of housing types throughout the community.

The initial Village feasibility study set out the housing types in Table 9 that are further described in the Ladysmith Design Code. Mansions are explained as “a large single-family dwelling unit on its own large lot, often with an outbuilding in the rear yard”. Houses are defined as “single-family dwelling[s] on [their] own lot, possibly shared with an outbuilding in the rear yard”. “A single-family dwelling, smaller than a house, on its own lot or sharing a lot with a house as an outbuilding” is how the Ladysmith Design Code defines a Cottage. Townhouses are slightly different than houses and cottages because, while still single-family dwellings, they share common walls on side lot lines with continuous facades. Apartments are considered building types that accommodate multiple dwellings typically sharing a common lobby entrance.

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<thead>
<tr>
<th>Housing Type</th>
<th>Number of Units</th>
<th>Percent of Total Units</th>
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</thead>
<tbody>
<tr>
<td>Rowhouses</td>
<td>300</td>
<td>10.5%</td>
</tr>
<tr>
<td>Cottages</td>
<td>342</td>
<td>12.0%</td>
</tr>
<tr>
<td>Village Houses</td>
<td>421</td>
<td>14.8%</td>
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<tr>
<td>Large Village Houses</td>
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<td>14.0%</td>
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<td>Neighborhood Houses</td>
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<td>13.0%</td>
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<tr>
<td>Large Neighborhood Houses</td>
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<td>Mansions</td>
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<tr>
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<td>15.8%</td>
</tr>
<tr>
<td>Total</td>
<td>2,850</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Table 9: Housing Types and Percentages proposed within Ladysmith Village
The target market for Ladysmith Village includes young professionals, small families and older empty nesters. This market is optimal for Traditional Neighborhood Design Development because the design of neighborhoods like Ladysmith Village calls for small lots, close-knit communities, small yards and more narrow homes. The migration area for the Village encompasses the Richmond area (including Hanover and Henrico Counties) and the Fredericksburg area (including the Counties of Prince William, Stafford and Spotsylvania).
Map 4: Ladysmith Village Future Land Use, as designated by the Caroline County Comprehensive Plan
**Retirement Housing**

Retirement communities and assisted living facilities vary in style, size and scope. On the whole, most retirement communities contain the same type of amenities to attract and retain residents. These amenities include recreational activities, shopping and socializing opportunities. Amenities for retirement communities include golf course packages, driving ranges, fitness facilities, indoor and outdoor swimming pools, travel excursions, arts and crafts rooms, card rooms, central libraries, ballrooms, tennis courts and walking trails. Many of these communities also include such activities as game nights to get residents together to socialize. Some communities even have central kitchens and gourmet restaurants with professional chefs. Religious establishments are also present in some developments. Included in some communities are concierge services to aid residents.

Many retirement communities are exclusive, gated communities with their own identity. Not only are the communities gated, but often they include larger housing lots than those a TND would offer. In a TND development, a retirement community blends in with the style of the neighborhood, including smaller lots and rear loading lots served by alleyways. Homes within retirement communities are generally designed to be one story and have larger living areas. These communities include both single family detached and attached homes.

The typical restrictions for retirement/age-restricted communities is 55 years of age and older to be a resident. Some communities allow for a certain percent of residents to be younger than 55 years of age, if they are at least 40 years of age and living with another resident who meets the requirements.

Assisted living facilities have many different aspects. There is a special level of care needed to care for elderly residents. The phases of assisted living range from minimal assistance to full care. Assisted living includes medical aid, bathing services, rehabilitation services and personal care. Rehabilitation services include exercise opportunities to help residents remain active. Many facilities have a centralized kitchen and dining area to serve residents healthy meals and eliminate the potential hazard with kitchens. Kitchenettes are typically available in assisted living apartments to give the residents the freedom to cook snacks and small meals. While some residents still live in their own apartments, others are closer to medical attention.
Design Alternatives

There are several design alternatives for the age-restricted community. One alternative is to integrate the age-restricted community from the other sections of the overall community of Ladysmith Village. This alternative would integrate residents of all ages and create more of a community feeling.

With an optimal housing stock of 600 units, this option would allow for six neighborhoods of 100 active adult/age-restricted homes dispersed and interconnected with the whole community. These pods would be strategically placed to remain within close proximity to all desired amenities. The assisted living and long-term care facility will remain in a central location to easily serve all those who need assistance and care.

One issue with incorporating the active adult housing into the overall Ladysmith Village is that sections of Ladysmith Village are already constructed or under construction. The idea of smaller sections of active adult housing also has the potential to cause conflict with homebuyers who wish to live in a specific area of the community, but are restricted to those sections. Additionally, amenities specifically designed for the residents of the Retirement Community would not be as centralized or exclusive.

A second alternative plan for the Ladysmith Village Retirement Community is to fully integrate the active adult housing units within the assisted living and continuing care facilities. Possible drawbacks to this configuration are that the mixing of larger buildings and parking lots with single family dwellings could cause conflicts between residents. The pattern of rear loading lots served by alleys versus larger buildings with parking lots for the assisted living and long term care facilities has the potential for issues with street layouts.

The recommended design alternative for the Ladysmith Village Retirement Community is one that separates the active adult component from the assisted care and long term care facilities. This alternative includes commercial components in both sections of the community as well as a community center to serve the whole retirement community. The sections of the community are bound together by interconnecting roads and pathways.

Ladysmith Village Retirement Community

The Retirement Community component of Ladysmith Village will consist of an active adult component with just over 230 single family lots, an assisted care facility (encompassing two phases of assisted care-varying degrees of assistance leading to the long term care), a long-term care facility, commercial components and a community center. With all three phases of an age-restricted community, residents have the option and ability to remain in their own communities as they age.
The 300 acres designated for the project, currently comprised of four separate parcels and shown in Map 6, is wooded, undeveloped land. South River flows through the middle of the two main parcels that make up the 300-acre project. With the river come strict regulations for development. The Chesapeake Bay Preservation Act, as previously stated, is enforced in Caroline County and requires a one hundred foot natural buffer from the edge of the water for the Resource Protection Area, RPA. This will need to be considered in the implementation of any design. The 100-year flood zone on the property follows, for the most part, the RPA boundary and carries fewer restrictions on the development. Work within the wetlands is possible at times if permitted by the Army Corps of Engineers. The ideal situation is to retain the required 100-foot buffer and use the area as common space for all to enjoy. Due to the amount of land associated with this project, development in the RPA will not be necessary.

Map 6 shows the 300 acre project parcel outlined, as well as the 100-foot required RPA buffer. Also highlighted on the map is the Flood Plain on the property. The RPA and Flood Plain are the two areas to be avoided in development. The terrain on both sides of South River slopes toward the river. The topographic map with RPA boundary, 100-year Flood Plain boundary and property boundary is shown on Map 6. There are sections of the project that are more severely sloped than others.

Two roads currently serve the project properties, Durrette Road and Bullocks Road. Other roads that will eventually serve the undeveloped property are those that connect from the Ladysmith Village community. Public water and sewer connections will be available to the project through the parent project, Ladysmith Village. Access to the property is from three different points. The most direct access to the active adult section of the community, and the main entrance to the section, is Durrette Road. Bullocks Road will serve the long term care and assisted living facilities most conveniently, while the community center will be best served by roads from the Ladysmith Village.
Map of area
Goals & Objectives for the Retirement Community

Goal 1: The age restricted community is designed to integrate into the overall community and continue the Traditional Neighborhood Design atmosphere of Ladysmith Village.

Objective 1: Plans are consistent with the pre-approved Ladysmith Village Design Guidelines.

Objective 2: Houses utilize the same patterns and styles as those in Ladysmith Village.

Goal 2: The age restricted neighborhood is served by a regularly scheduled transportation system to carry residents to and from commercial areas within Caroline County, as well as surrounding jurisdictions.

Goal 3: The neighborhood has a walking environment that is connected with the services and amenities in the area.

Objective 1: Traffic Calming measures are used to ensure 25 mile an hour speeds are adhered to throughout the community.

Objective 2: Sidewalks are buffered from vehicular traffic by grass strips and street trees.

Goal 4: Commercial and retail spaces are integrated into the community.

Objective 1: Pods of commercial and retail spaces are within a one-quarter mile walk of all housing.

Objective 2: Commercial and retail spaces are designed to human-scale.

Objective 3: Larger commercial areas serve the overall Ladysmith Village Community, including the Retirement Community.

Goal 5: The natural environment is prominent throughout the community.

Objective 1: Natural landscaping is used whenever possible along South River.

Objective 2: Street trees and gardens provide shade and greenery throughout the community.

Objective 3: Walking trails are created as places to exercise.
**Goal 6:** Benches and resting places are easily accessible in the community.

**Objective 1:** Benches and trash receptacles are present along trails to provide resting places for walkers and aid in the efforts to maintain a clean environment.

**Objective 2:** Benches and shelters are provided at all bus stops to allow comfortable, safe spaces for residents to wait.

**Goal 7:** Lighting provides a safe environment for residents.

**Objective 1:** Human scaled street lighting is evenly spaced along streets and pathways.

**Goal 8:** The retirement community is a safe and efficient neighborhood for residents in the community.

**Objective 1:** Flat grades are used along all walking trails and yards to reduce the potential for accidents.

**Goal 9:** A Homeowner’s Association is charged with upkeep of the community.

**Goal 10:** Recreational facilities are accessible to residents in all phases of the Community.

**Objective 1:** A central clubhouse includes recreational facilities for residents.

**Objective 2:** Smaller facilities are included in the assisted living and long term care centers to provide older residents with recreational and therapeutic opportunities.

**Goal 11:** Medical facilities are within the retirement community to serve the needs of its residents.

**Objective 1:** Emergency care is available to care for residents with urgent needs.

**Objective 2:** Acute care and medical services are available to all residents when needed through physician’s offices within the community.

**Objective 3:** Medical assistance to nearby hospitals is available and used whenever patients need further care.
Plan for the Community

Residents:

The active adult community of Ladysmith Village includes active adults 55 years of age and older. Residents in the retirement community are empty nesters, with no children or grandchildren in their household. Additionally, the community includes residents who need more attention and are living in the assisted living facility. These residents eventually transition to the long-term care facility when the time is right. Residents have varying income and cultural backgrounds.

Amenities:

In retirement communities many amenities are important. It is essential for residents to have a wide range of activities, shopping, medical care, transportation and restaurants within walking distance. Activities include exercise, games and social events. Shopping should include small boutiques, newsstands, coffee shops and drugstores.

While drugstores will provide general medical supplies and pharmacy activities, medical care will also be needed in the vicinity. The types of medical care needed within the retirement community will be minor medical care, urgent care and emergency care. Urgent care will be needed and must have the ability to sustain any injuries or illnesses to residents while awaiting additional care. The urgent care facility will be planned with the overall community and turned over to a medical company that specializes in the care of elderly. Additionally, the assisted care and long term care facilities will be administered by private companies that specialize in the care of elderly residents.

A centralized clubhouse serves residents of the active community. The clubhouse includes game rooms, an exercise room, pool, shuffle board area, arts and crafts room, piano room, and sitting rooms with coffee and tea times. The clubhouse and community activities will be run by the Homeowner’s Association so that residents have control over the types of activities and amenities associated with the community center.

Pendleton golf course is in close proximity to Ladysmith Village and the Retirement Community. Pendleton golf course offers reduced week day fares for Retirement Community residents. Transportation to and from the golf course is available from the Community Center upon request.

South River flows through the center of the overall Retirement Community property. A walking/biking trail follows the path of the river and connects with the existing trail in Ladysmith Village. The path is large enough for both pedestrians and cyclists. Benches are present along the path at quarter mile intervals.
intervals at official path entrances (approximately 1,320 feet apart) and allow resting places for walkers and bicyclist alike. Natural landscaping is present along the river’s edge. Pedestrian and bicyclist crossovers exist at several points along the river’s walkway to allow for pedestrian access to both sides of the community.

In addition to recreational features, Ladysmith Village Retirement Community offers many volunteer opportunities. Since many residents are retired and no longer working, volunteering affords residents the opportunity to interact with others and help their community. These opportunities come from the local library in Ladysmith Village, the YMCA and elementary school located in South River.

Transportation will include bus service to local conveniences such as the grocery store, commercial businesses and services. Bus service will also travel to Richmond and Fredericksburg for additional restaurants, shopping and services desired by residents. Transportation is expounded upon in the Transportation Section of the plan.

Technology:

To mitigate for the possible traffic issues and concerns of residents, a telecommunications center is available for daily work. Two rooms are equipped for tele-conferencing. These rooms are available during the week from 8:00 am to 5:00 pm (and by special request for other times) and are located in the commercial center of the active adult section of the community. In addition to telecommunication, the community (including the assisted living and long term facilities) are equipped with wireless internet services. Residents are given all codes to connect to the wi-fi system, which is secured to protect residents and provide the fastest service possible.

Streetscape:

Streets will be lined with trees and sidewalks. Trees will provide for a canopy for streets and shade from the sun in the summer. Trees will be on thirty foot centers to allow for appropriate canopies. Lighting will be spaced at 30 foot intervals with benches adjacent to every other street lamp. Waste receptacles will be adjacent to every other bench to provide places for residents to dispose of trash and clean up after their pets. The Homeowners Association is in charge of the removal of all waste and upkeep of all benches and landscaping. Diagram 1 shows the plan view of the typical street with sidewalks, landscaping and parking on both sides of the road. The use of trees and
street parking will assist in traffic calming and keep cars from exceeding speed limits through the neighborhood.

Transportation:

Buses have a regular schedule throughout the week to carry residents to Central Park (a large strip mall in Fredericksburg, about 20 miles north of Ladysmith) to shop. The buses have regular, more frequent schedules during the week to take residents to local shops, restaurants, grocery stores and services. Bus service is an extension of the FREDericksburg Transit System (FRED) that will aid in serving the retirement community of Ladysmith Village. Additionally, a passenger van is available from the community center to residents for scheduling of specific trips to the surrounding shops and services. Van services are operated by the Homeowner’s Association.

Transportation to the nearest Virginia Rail Express (VRE) station is available to residents during the week, another service offered by the Homeowner’s Association. The ride-sharing program aims to have residents to the station by 7:00 am and leave the station between 5:30 and 6:00 pm. Transportation to and from the station eliminates some of the hassles of northern Virginia traffic for residents employed in those areas.

Furthermore, the interconnecting streets allow for residents to use licensed golf carts along neighborhood roads. This provides residents with a greater freedom throughout the community, while using less gas and fewer dangerous accidents.

Community Design:

Houses, community buildings, commercial, retail and office spaces conform to the Ladysmith Design Code (revised 1/31/05) and be subject to the Ladysmith Design Review Board. Additionally, as stated in the Design Code, all structures will conform to all Caroline County regulations.

Building Design:

Homes within the Active Adult section of the age-restricted community in Ladysmith Village are restricted to one-story to reduce the need for stairways and the occurrence of accidents. Additionally, the use of one-story homes reduces unused space. As people age, they find it easier to remain on the bottom level and do not use the second story of their homes as often. Residents find that the need for larger houses decreases as they age. Additionally, residents enjoy larger living areas more than larger bedrooms.

Houses within the Active Adult community are a combination of detached single-family homes and attached single-family homes. Houses have sunrooms
or patios, large kitchens, large dining rooms and large living rooms. Houses also include master suites with handicap accessible bathrooms. Full bathrooms include walk-in showers with grab bars to protect residents in the case of an accident.

Also installed in every home is an emergency buttons for residents to have direct access to fire and rescue operations in the area. This will speed the response time to residents in need of assistance.

The assisted living facilities and continuing care facilities are designed as multi-family structures with apartment and studios and are designed with the same features as the community clubhouse.

See Appendix B for sample house layouts and Appendix C for sample photos of Ladysmith Village designs. In keeping with the TND style of development, houses are accessed from the rear of the property by alleys throughout the development. The sample floor plans show how garages are in the rear of the home, away from the main street.

Assisted living and long-term facilities are designed consistently with the Community Center. Buildings are not typical, multi-family establishments, but integrated designs that flow with the vision of the community. While the design of the assisted living and long-term facilities does not resemble a nursing home on the exterior, it is functional and includes services most needed by all residents.

Layout:

The central community center for the retirement community in Ladysmith Village is in the northeastern section of the property where it is close to both the retirement community and the overall Village community. On the northern side of South River are the Assisted Living Facility and Continuing Care Facility. The Continuing Care Facility is closest to South River and allows residents with less mobility easier access to the River. Access to the care facilities is from Bullocks Road, as well as from Ladysmith Village. The easiest access to the Community Center is from Ladysmith Village.

The Active Adult section of the Ladysmith Village Retirement Community is located on the southern end of the property and is served by Durrette Road. The roads interconnect and all parcels can be accessed from Ladysmith Village. There are few roads that cross the river to reduce the conflict between pedestrians and cyclists with vehicles.

The average lot size is 100 feet deep by 70 feet wide. The lot sizes are generally the same for both attached and detached homes within the Active Adult section of the Retirement Community.
Restrictions:

Each home must have at least one resident 55 years or older and other year-round residents must be at least 40 years of age. Children under the age of 18 can be in the homes for no more than three months out of the year.

These restrictions ensure that the community retains its character. No children are intended to reside in the community year-round and community activities and programs are not designed for those under 40 years of age.

Additional Aspects

Since the community requires the labor of many people to function on a daily basis, there is the need to offer accommodation to those employees (especially for those associated with the assisted living and long term care facilities). Included in the adjacent sections of Ladysmith Village is affordable housing. This is affordable as determined by the market value within existing Caroline County residences, not values within Ladysmith Village itself. These homes are available to those who work within the Retirement Community, but are not reserved solely for them. At least ten percent of the houses in the adjacent sections of the Village are deemed affordable housing. All housing design guidelines remain in effect for those sections as well.
Appendix A

Ladysmith Village Maps
Appendix B

Sample House Floorplans
Single Family Attached
Single Family Detached 2
Appendix C

Ladysmith Village & Project Parcel Photos
Photo 1: Ladysmith Village Entrance

Photo 2: Standard Street Light
Photo 3: Street Signs in the Village

Photo 4: One Story Single Family House in Village
Photo 5: Typical Street with On-Street Parking

Photo 6: Housing Styles in Ladysmith Village
Photo 7: Project Property

Photo 8: Project Property
Appendix D

Ladysmith Village Retirement Community
Layout
Appendix E

Ladysmith Village Market Study