
Town of Middleburg

R-2 District

Community Workshop Report

December 4, 2023



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Purpose & Scope

The Berkley Group, a Virginia-based local consulting firm, partnered with the Town of Middleburg to facilitate a public engagement event regarding the R-2 Zoning District. The R-2 Zoning District is a designated area on the official Town zoning map that primarily allows for construction of single-family detached dwellings and their accessory uses. Some members of the community have stated concerns with the character of more recently constructed homes in the R-2 District. These concerns range in nature and relate to multiple district standards. However, the purpose of this project was not to analyze specific zoning standards. Instead, this project was intended to receive a consensus from the community about development topics in the R-2 District.

The facilitated engagement occurred in the form of a community workshop that was open to the public and asked attendees for their feedback about residential development similar to the R-2 District development. The Berkley Group then synthesized the feedback into this report for the Town of Middleburg. Town Council's goal was to determine community sentiment and to consider potential changes to the Town's land use regulations that might address any ongoing concerns.

Report Outline

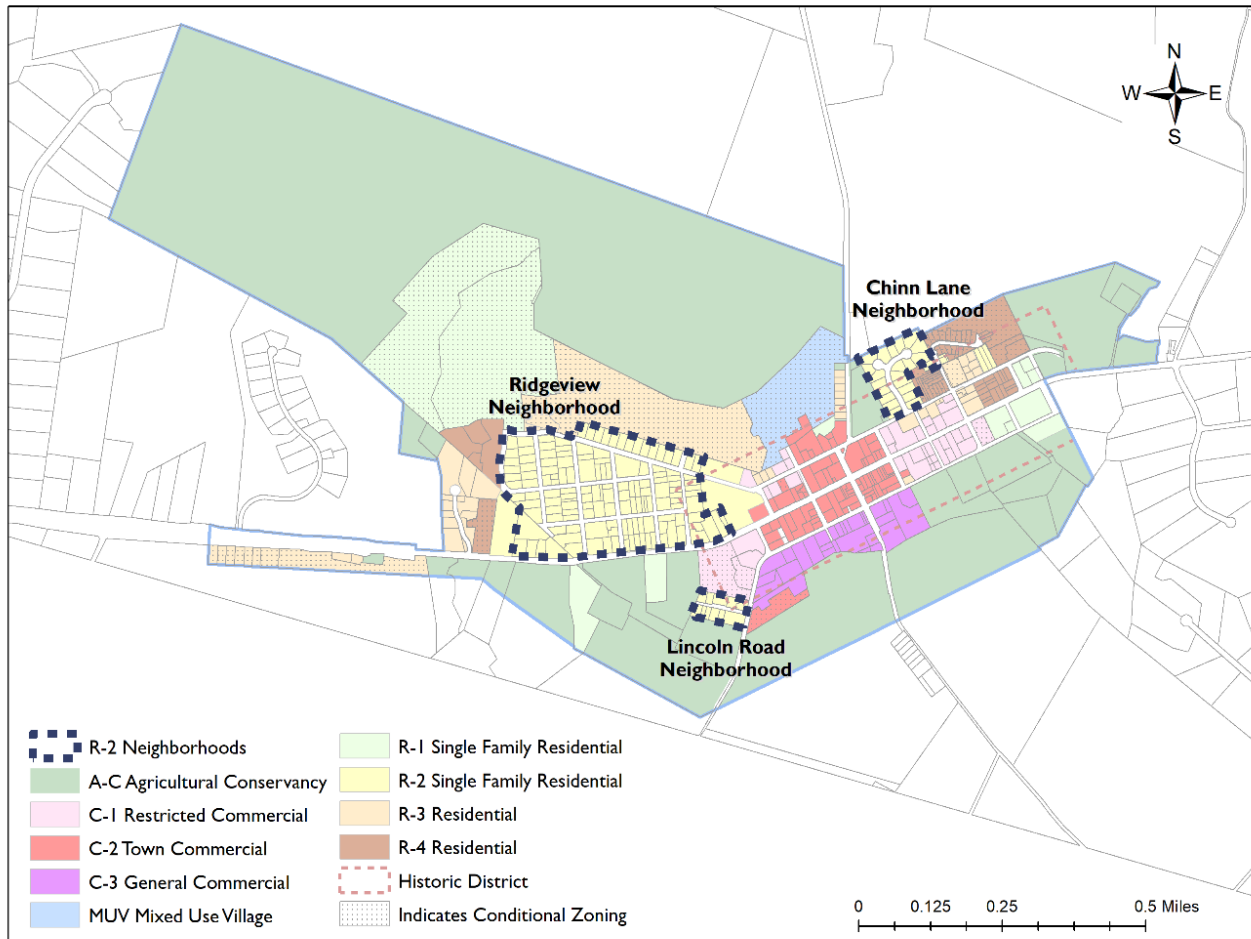
The following report is a summary of the existing conditions, community workshop activities and results, and Berkley Group's recommendations. The report is structured into five separate sections which are explained as follows:

- Purpose & Scope: This section discusses the intentions and reasoning behind the project.
- Existing Conditions: This section provides background on the R-2 Zoning District, where it is located, and what zoning regulations are currently in place.
- Community Workshop: This section details the community workshop location and process. It also contains a summary of the responses and provides some of the key themes and takeaways from those responses.
- Recommendations: This section includes actions that the Town could take to address the concerns that were voiced at the workshop.
- Next Steps: This section outlines the next steps to be taken for this project.

Existing Conditions

The R-2 Zoning District encompasses a large portion of the Town of Middleburg and accounts for the majority of the residential zoning within the Town as shown in yellow on the Zoning Map included below. A small portion of the R-2 District lies within the boundaries of the Town's current Historic District, the red dashed rectangle, and the majority is not subject to review by the Town's Historic District Review Committee (HDRC).

Figure 1: Middleburg Zoning Map Showing R-2 District Neighborhoods



District Standards

Every Zoning District has standards that dictate the look and feel of development within that district. Examples of these standards include, but are not limited to: setbacks – the distance a structure must be from the street and neighboring lot; lot size – the minimum size required for a parcel/lot of land; or height – the maximum height of a building. Characteristics of dwellings such as height, distance between dwellings, and distance from the street determine the look and feel of a given community. The district standards for the R-2 District are detailed in table 1.

Table 1: R-2 District Standards

Minimum Lot Size	8,000 sq. ft.
Minimum Lot Width	50 ft at front yard; 40 ft at property line
Front Yard Depth	20 ft. min.; 30 ft max or no less than both adjacent lots for infill
Side Yard Depth	7.5 ft. min.; 20 ft. for corner lot
Rear Yard Depth	30 ft.
Lot Coverage	30% max., never to exceed 3,750 sqft <i>*(Amended from 30% in 2022)</i>
Impervious Lot Coverage	45% maximum, never to exceed 5,625 sqft <i>*(Added in 2022)</i>
Principal Building Height	25 ft.; 30 ft. with increased side yard
Accessory Structure Height	15 ft.

Recent Development

The R-2 Zoning District has seen in-fill development over the past decade due to demand pressures such as the proximity of Middleburg to Washington D.C., the COVID-19 Pandemic and the resulting increase in the desirability of working from home, coupled with attractive quality-of-life benefits of Middleburg. This has brought new demand for different types of residential development including greenfield and infill development, home restoration, additions, and the tear-down of older residences and their replacement with larger units.

These development trends have increased in recent years, with 9 building permits being issued for the R-2 District since the year 2020, a significant number given the Town of Middleburg's size. This increase has resulted in concerns from residents within the R-2 district about the changing character of their neighborhoods.

The Berkley Group reviewed the R-2 District in the Spring of 2022 and delivered a report to the Town detailing best practices and suggesting a selection of interventions which could be implemented within the zoning district. This report outlined three levels of interventions: Level 1 recommended a minimum set of changes including adding maximum impervious lot coverage requirements for buildings and surfaces. The Town implemented these changes in 2022. Level 2 proposed Additional Development Requirements relating to lot size, coverage, and minimum tree canopy and landscaping. Some of these were addressed such as a maximum lot coverage requirement. Level 3 interventions proposed Architectural Design Standards to address issues such as style and massing. At the time of this report Level 3 interventions had not been implemented.

Despite these interventions the Town has continued to receive input from residents about development in the R-2 District. However, input has been varied, with some members of the public expressing concern and others expressing a willingness to see how the latest regulations are implemented. As a result, it is important to determine the consensus of the community regarding development in the R-2 District to provide Town Council and Staff with guidance on possible next steps.

Community Workshop

The Berkley Group facilitated a community workshop on October 16th, 2023, at the American Legion at 6:00 PM. The workshop was advertised through a community flyer, which was distributed by the Town as well as posted on the Town website and social media accounts. A total of 56 community members attended and participated in the workshop. The workshop was also attended by elected and appointed Town officials as well as staff members.



Workshop Structure

The structure of the workshop was to present participants with a two-part, visual preferences exercise showing development with characteristics similar to that which has recently occurred in the R-2 District. The first part of the exercise was designed to determine general opinions of such development, and the second part of the exercise was designed to determine preferences for alternatives, if any.

Attendees sat at eight tables in groups of approximately eight attendees. Each group was asked to select a recorder, whose job it was to record the responses of each group in a packet of questions that were given to them at the start of the workshop.



Exercise 1 – Preference Discussion

In the first exercise participants were shown four different pictures of residential development and were asked to discuss and come to a consensus on each, regarding their preferences of design. The worksheets placed at each table included prompts to help engage the groups in conversation. The prompts asked what they liked about the development, what they didn't, and whether they believed the development was appropriate for the Town and their neighborhood. Each group reported their consensus on a portion of the four pictures to all workshop attendees before exercise two began.

Exercise 2 - Alternatives Discussion

Exercise two was conducted similarly to exercise one. Participants were asked to work in their groups to provide feedback about pictures of residential development across four different questions. This time, each question included an original picture from the first exercise along with three contrasting examples showing similar development with differences in key features such as setbacks and garage placement. Groups were then asked to assess each of the four questions and describe what development features they liked the most out of the given options for each

question. Following the second exercise, groups were asked to report their response to one of the questions to the workshop attendees.

Workshop Results

After the conclusion of the workshop Berkley Group staff collected responses and tabulated them into a raw digital state and then reviewed and categorized based on the type of feedback received.

After analyzing participant responses Berkley Group staff produced the following summaries of common feedback, preferences, and themes for each question. Each summary also includes the visuals that were shown for that specific question:

Exercise 1 – Preference Discussion

Is this the kind of residential structure we would like to see built in our Town? How do you feel about specific aspects of the structure, such as height, garage, closeness to surrounding houses or the street? Are there benefits to the community such as newer, roomier houses, increased tax revenue, or more desirable floor plans? Would you like to do something similar with your house? Are there impacts on surrounding properties?

Example Number 1



Results:

- Participants liked the diversity of build styles that were portrayed and felt that this diversity provided more character.
- The size of the home on the left was seen as too big in contrast to the one on the right, and an issue to neighborhood scale and viewshed.
- The front facing garage built into the façade of the home was also seen as undesirable.

Example Number 2



Results:

- Participants did not like the similarity in houses shown in the picture and did not like this type of uniform “cookie-cutter” development and the lack of building diversity.
- There were concerns raised regarding the side and front setbacks being too small and the homes being too close to each other and to the sidewalks.

Example Number 3



Results:

- Concerns were raised regarding front facing garages attached to this home.
- The height of the building and its design, with a combination of architectural styles, were also seen as undesirable by groups, specifically the angular look, color, and building materials.

Example Number 4



Results:

- A majority of groups were complimentary of the varied front setbacks shown in this example.
- Some preferred the stagger to be less extreme than what was shown.
- The landscaping in this example was pointed out as desirable for residential development.
- Preferences for a certain amount of diversity, versus homogeneity within the area, continued to be a theme.

Additional Comments

Is there anything else that you've noticed about the recent construction in your neighborhoods that you'd like to discuss?

- Consistent feedback was received about greater regulation over the development taking place in the Ridgeview neighborhood.
- Comments indicated a desire to keep the historic charm and feel of the Town, while also encouraging diverse development types so long as they do not stray too far from the typical design styles that already exist within the R-2 District.

Exercise 2 – Alternatives Discussion

How do the alternative examples differ from the original? Is there something about them that is preferred? If so, what and why? If not, why not?

Example Number 1



Results:

- Almost all groups agreed that Option 2, with its traditionally designed houses and setbacks, was the most desirable of the alternatives shown, and offered the most diversity in traditional housing design, which was typical of the existing R-2 District housing stock.
- Participants also viewed Option 1 being too large and contemporary, and disliked the front garages shown in Option 3.

Example Number 2

1



2



3



Results:

- Less consensus existed for this question than that of Question 1 in Exercise 2.
- Most groups believed none of the alternatives were perfectly appropriate for the Town, however Option 3 was the least objectionable due to the traditional building style and significant attractive landscaping.
- Overall there was a preference for traditional early to mid-20th Century architectural design and an absence of front facing garages.

Example Number 3

1



2



3



Results:

- The majority of feedback received on this question related to the garages and porches.
- All groups shared negative feedback about the presence of garages, but indicated a preference for the detached, rear-yard version shown in Option 3.
- Positive comments were received about the porch on Option 3, again indicating preference for more traditional residential design aspects.

Example Number 4



Results:

- Most groups indicated a preference for the setback style shown in Option 2, though one group preferred Option 3.
- These results indicate a desire for visual interest and some variability in setbacks, typical of traditional neighborhoods.

Additional Comments

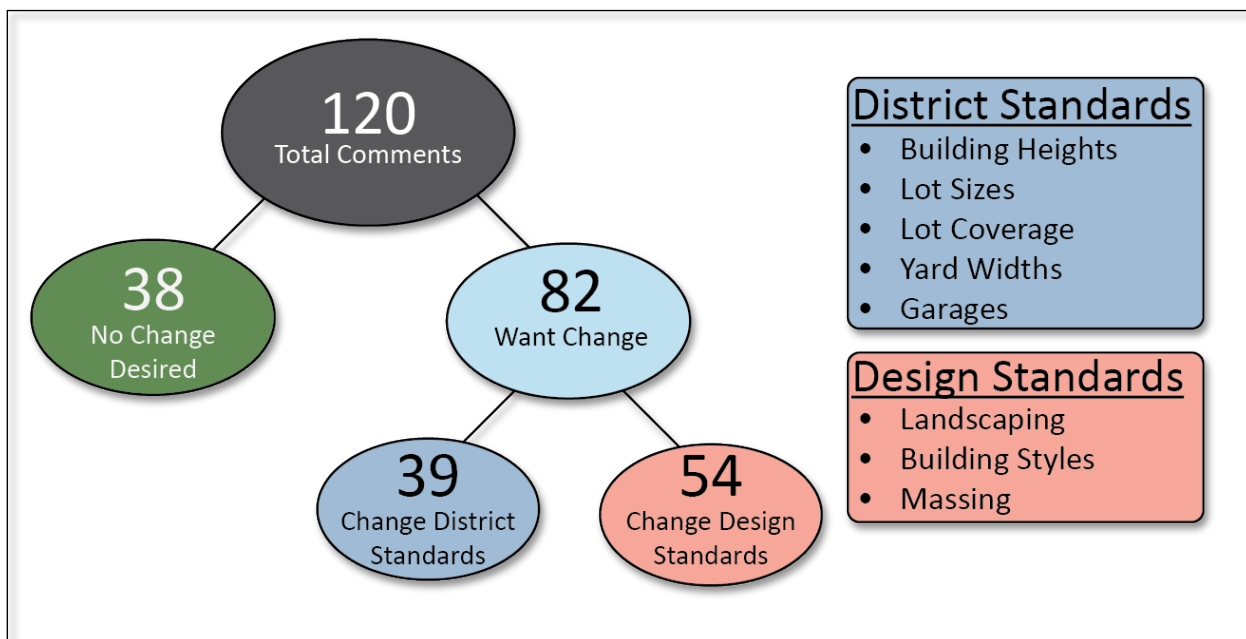
Do you have any other ideas for alternatives?

- Multiple groups expressed a desire for the expansion of Architectural Review Board authority throughout the Town to review design aspects of all new development.

Key Themes & Takeaways

Participants at the workshop provided approximately 120 different comments worth of feedback across the two exercises. These comments have been reviewed and thematically mapped to try and understand some major trends or takeaways from the workshop. Of the 120 comments reviewed, 38 of them indicated that no changes to regulations were needed at this time. Of the remaining 82 comments that wanted to see some degree of change, 39 of them wished to see changes to Zoning District standards, such as building heights, lot coverage, or yard widths, and the other 54 indicated that requirements for Design Standards for new development may be needed, this includes things such as garages, landscaping, building styles, or massing.

Figure 2: R-2 Workshop Results Web Graphic



Given these responses, it appears that a majority of participants who participated in the workshop do believe that there are additional zoning changes that would be appropriate for the R-2 District. A slight majority of those favoring changes singled out issues that must be addressed through Design Standards, such as a preference for early 20th Century residential architectural styles, and height and massing similar to adjacent properties. However, it would be possible to address a large minority of the issues that were identified through additional District Standards. These include a prohibition on front facade garages, traditional setbacks, and attractive landscaping. Interestingly participants preferred some variability in styles and front setbacks, but only within what they considered an appropriate range, typical of the existing housing stock, and not significantly taller or larger than adjacent houses, and not significantly closer to the street. In general, these preferences indicate the desire for new construction to “fit in”, and to be harmonious with what has already been built, respecting the style and character of the existing neighborhoods.

It should be noted that the responses received during the workshop were from participants that were specifically asked to provide feedback regarding similar examples of development within the Town. Further public engagement regarding proposals for specific regulations, rather than general feedback, is recommended if the Town wishes to make additional changes.

Recommendations

After considering community feedback collected during the workshop, the following is an analysis of the range of options the Town could pursue, along with a recommendation by the Berkley Group. These options are presented as a spectrum of size and intensity of change, with no change to the Town's current land use being the simplest action taken, and each successive change being larger and more intensive, with greater effects to residents and developers.

Option 1 – No Change

As stated above, about one third of the comments received during the workshop indicated that no changes needed to be made at this time. This feedback took two forms: 1. Increased regulation would be burdensome and would interfere with property owners ability to do as they wish with their property, and 2. The possibility that recent changes to the ordinance, such as lot coverage, needed time to “play out”, suggesting some support for a wait and see approach.

Option 2 – Alter R-2 District Standards

Altering Zoning District standards is a typical process that would require the Town to make Zoning Text Amendments to address the standards in question. Based on the feedback received, increasing yard requirements, decreasing building ratios, increasing setbacks, and decreasing maximum lot coverage may be the most warranted district standard changes for R-2.

Option 3 – Alter Zoning Ordinance Supplementary Use Regulations

As opposed to District Standards which regulate items such as setbacks and height, Design Standards can be used to control factors such as location, arrangement, and materials. While they do not have the specificity of Architectural Control, they can provide the ability to require that key characteristics of the neighborhood meet the community's expectations.

The Town's Zoning Ordinance already includes similar requirements for other uses in Article XII Supplementary Use Regulations, and this section could be amended to require them for the R-2 District as well. Several issues raised by the community such as the placement of garages behind the rear building line, landscaping and fencing, placement of driveways, and some simple design elements such as roof shape can be addressed in this manner.

Design standards also have the advantage of being able to be interpreted by staff during plan review for a building permit, avoiding long review times and additional costs. Since they are part

of the Zoning Ordinance, relief from Design Standards can also be granted by variance if warranted.

Option 4 – Expansion of Architectural Review

The final option presented for consideration, includes the suggestion to create an Architectural Control District, which is allowed by the Town’s Charter. This is the most significant suggestion, but also provides the most ability to address issues workshop participants raised such as character and style.

An Architectural Control District requires that standards be adopted and then enforced. The District could be administered by Town Staff as an administrative function or by a body appointed by the Town Council. The specific purview of the District depends on the Council’s preference after receiving additional community input: for instance, the District could address a very limited number of items, such as location of garages and massing. Alternatively, a District can be very broad, including size, massing, materials, colors, and overall compatibility with existing structures.

Creation of an Architectural Control District would require the most amount of work of all the proposed Options presented, as significant amounts of regulation and additional code would need to be put in place. This option would also likely have a significant impact on the community, including residents and property owners. If the Town wishes to pursue this option, it is recommended that a comprehensive community engagement be conducted first.

Recommendation Summary

Given the general opinions and concerns of residents and considering the costs and benefits of the above options, Berkley Group recommends a combination of solutions from Options 2 and 3 as the most balanced way to address the issues workshop respondents identified. Generally, this recommendation is in alignment with the previous report from April of 2022, which detailed similar potential changes, some of which were implemented.

This approach would require amending the R-2 District Regulations to further refine setbacks and lot coverage, and also amending

Article XII Supplementary Use Regulations to employ design standards for R-2 that address factors such as garage placement and orientation. Making these changes will address many of the

concerns that were expressed during the workshop and will ensure better neighborhood continuity. This course of action also provides more deference for the residents who felt that no changes are necessary, or who wanted to avoid significant amounts of regulation and the associated impacts and costs to property owners.

USE ZONING TOOLS TO REFINE SETBACKS AND LOT COVERAGE, WHILE ALSO EMPLOYING DESIGN STANDARDS TO ADDRESS CONCERNS SUCH AS GARAGE PLACEMENT AND ORIENTATION.

Next Steps

Should the Town of Middleburg decide to pursue changes to its land use regulations to address the concerns of residents, the next step should be to engage with the community regarding the specific proposal the Town wishes to pursue. Community discussion and feedback will be critical to moving forward in a manner that has community buy-in and will ensure new development meets the form and quality that Middleburg residents desire.

The following steps outline actionable steps for the Town to take to begin addressing a selected course of action:

1. A joint meeting with Town Council and Planning Commission to review this report, discuss the outcomes of the meeting, and discuss areas of commonality for the next steps.
2. After the joint meeting, Town Council may revise its intent to amend the Zoning Ordinance in order to more specifically define the steps it will take, and will then forward the matter to the Planning Commission for review and potential action.
3. Engage the community to get feedback on the desired proposal.
4. Create a draft of regulations incorporating any community feedback on the proposal.
5. Share draft regulations with the community for additional feedback.
6. Adopt and implement new regulations.