

HERITAGE OAKS GOLF COURSE Envisioning the Future of a Municipal Course



Technical Assistance Panel Report | JULY 14-15, 2021

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ON THE COVER: The Heritage Oaks Golf Course (*TAP PANEL MEMBER*



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Acknowledgments

ULI Virginia is grateful to the City of Harrisonburg, Virginia, for inviting ULI to study and make recommendations to help shape the future of the site of the current Heritage Oaks Golf Course.

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I. EXECUTIVE SUMMARY

Harrisonburg has a well-defined vision toward creating a city that serves all people with a broad range of opportunities to live, work, and play in a vibrant, equitable and healthy community setting. At the core of that vision are important community-driven goals including:

- A Thriving Educational Epicenter
- Available Housing for All
- Distinctive, Reliable Delivery of High-Quality City Services
- Economic Development: Goals, Gains, and Growth
- Fiscal Sustainability and Planning

In keeping with its commitment to this vision, the City continues to take a critical look at its community needs, assets, and public infrastructure. The Heritage Oaks Golf Course (HOGC) is one community asset that is being assessed relative to how well it aligns with the City's vision. Discussion of the HOGC invites many perspectives as to the purpose and value of the facility, including how it performs against the list of City Vision and Priorities above.

Harrisonburg has a wonderful Parks and Recreation portfolio including a quality municipal golf course that is part of a mature system providing a broad range of services to the community. It is understood that Heritage Oaks Golf Course, and golf in general, is perceived by some to be an elitist activity and a symbol of white privilege. It is also true that the City has a stated commitment to Parks and Recreation options that meet the diverse interests and needs of the community to the greatest degree possible. Golf as a recreational activity is not going to serve all populations equally but it can have a place within healthy public Parks and Recreation systems found in thriving communities. Historical data suggest that the game of golf has made strides to reach a broader demographic in recent years. The First Tee program at HOGC is a value-added program that broadens access to golf as a form of recreation while providing valuable life lessons to underserved and at-risk youth in the area. The program is an effective way to move the needle in that regard, as half of the participants are minority children and the program also serves first time offenders.

The financial well-being of the HOGC is a significant area of concern for City leadership and the community. The golf course is a very high-quality municipal course and should be able to operate at an acceptable financial level on an annual basis with many of the changes currently being employed by the management team. A quality, efficient food and beverage operation, a more robust marketing program, and expanded partnering with local businesses, James Madison University and other educational institutions should be part of that strategy.

From a land use perspective, the City Land Use Plan identifies this site for continued Parks and Recreation uses. The City also has a sound guiding vision and a list of priority community needs (ref. Council Vision and Priorities, Feb. 2020). Any consideration to modify or eliminate the golf course as a future use must consider whether the property is the appropriate location to address other needs. For example, the need for new housing inventory across the whole spectrum of price-points in this market is well documented and the replacement of the golf course with affordable housing has been suggested. However, from a planning perspective, the HOGC may not be the most suitable location for affordable housing as it is relatively remote and lacks good access to public transportation options, biking, and walking facilities for convenient access to necessary goods and services.

City efforts to provide Parks and Recreation services that are appealing and more accessible to a greater diversity of the population might benefit from some creative use of the HOGC property to reach a broader user group. The desire to better serve minority and low-income populations is an important issue and is supported by the City vision. Like the housing issue, the addition of activities in this location that are typically more popular among minorities and low-income residents must assess convenience and accessibility from where those residents live and work. Connectivity between housing, employment, shopping, and services via good public transportation options is a must and locating the right facilities in the wrong location will ultimately not address the need. The addition of other recreation activities on the property should also consider potential unintended consequences to golf operations associated with the overall user experience and operations such as parking, traffic, competing use of clubhouse space, and noise levels.

The ULI Panel recommendations in this report are framed around three possible land use scenarios:

SCENARIO 1: RETAIN AND ENHANCE: PRESERVE THE SITE (18-HOLE COURSE, 190-ACRES) AS A QUALITY REGIONAL GOLF DESTINATION

Key Elements

- Expand recreation opportunities to drive increased and a more diverse user participation
- Explore various operational models including third-party management models
- Continue to improve operational performance
- Increase marketing efforts, corporate and institutional partnerships

The City could consider keeping the regulation course in its current form, with a focus on improved financial performance and options for complimentary activities appealing to the non-golfing community. With this approach, the HOGC property would focus on two business components of the property:

THE CONTINUED AND IMPROVED MANAGEMENT OF THE REGULATION GOLF COURSE

Improving profitability of the golf course will result from a combination of effective management, more cost-effective maintenance procedures, and increased player rounds resulting from maintaining the high-quality of the course and more aggressive marketing. A simple but effective food and beverage service is critical to success, as is improved management of pro shop and maintenance operations. As part of long-term financial stability, the City could explore various operational models including third-party management involving property sale or leasing options,

INCREASED PARTICIPATION RATES AND REVENUES

The enhancement of the overall property as a community recreation destination with a growing user base can result from expanded recreation opportunities and increasing marketing efforts. The City could also open the course to the public, offering activities such as movie nights and yoga. A focus on marketing the property, integrating Parks and Recreation's offerings, and creating partnerships to drive more activity to the site could improve its ability to increase revenue and open the course to broader public use.



SCENARIO 2: MODIFY AND REPURPOSE: PARTIAL REDEVELOPMENT OF SITE (50-ACRES) 9-HOLE COURSE (140-ACRES)

Key Elements

- Reconfigure 140-acres as a 9-hole golf course
- Sell 50-acres fronting West Market Street for development
- Offer a variety of housing options appropriate for the location
- Integrated neighborhood parks and connectivity to existing parks and schools
- Relocate Par 3 course, First Tee, and maintenance facility
- Leverage funds from the sale to meet citywide goals

Creating a modified golf course with a smaller footprint to accommodate a mix of uses is reflected in this scenario. The City could sell the 50-acres fronting West Market for development, leveraging the funds from the sale to meet citywide goals, including new housing options. The golf course would be converted to a 9-hole facility, maintaining the practice range, clubhouse, and maintenance buildings. This may require the relocation of the Par 3 course and some maintenance facility components.

This approach would not be consistent with the City Land Use Plan and the Panel cautions the residential products most appropriate for this location may not include affordable units given poor accessibility to transit and goods and services. This approach could maintain the First Tee facilities as a valuable community asset. Significant capital costs for infrastructure improvements to modify the golf course would need to be considered. Some benefits may be derived from the creation of new neighborhood park within the deed-restricted area and use of residential streets to enhance connectivity to existing parks and schools.









SCENARIO 3: REDEVELOPMENT OF THE SITE (190-ACRES, LESS 35-ACRE DEED RESTRICTED AREA)

Key elements

- Sell entire site for redevelopment, with defined restrictions for a preferred development program
- Convert deed restricted area into a neighborhood park
- Relocate Par 3 course, First Tee, and maintenance facility
- Provide new housing, limited neighborhood commercial, and connectivity to adjacent Parks and Recreation sites and schools.
- Leverage funds from the land sale to meet citywide goals

This approach would involve complete redevelopment of the property for primarily residential uses. The City would need to consider the inconsistency with adopted land use plans. In addition, traffic impact studies would be necessary to assess the impact of a significant increase in trip generation from proposed residential use. As part of the sale, the City could establish development constraints and criteria for the ultimate land use program for the property.





II. THE CHALLENGE



The Heritage Oaks Golf Course (HOGC) is an asset developed and owned by the City of Harrisonburg. It is a high-quality municipal golf course encompassing 18 holes, clubhouse, maintenance facilities, practice range, practice putting green, and a three-hole (par three) course on over 191 acres with 35 acres central to the property deed restricted for recreational purposes only. The course is in a suburban setting, on the west side of Harrisonburg surrounded by adjacent residential neighborhoods, schools, and public park land.

The HOGC was constructed in 2000-2001 at an initial cost of approximately \$4.4M with subsequent additions of an expanded clubhouse, parking lot and cart path paving at an additional estimated cost of \$533,000. The course opened in March of 2002 under management of the Parks and Recreation Department and averages around 28,000 rounds per year. In 2019 the Harrisonburg Parks and Recreation Department developed strategies to improve the financial performance and benefit to the community to achieve the following goals:

- Close The Deficit Between Revenues And Expenditures To Achieve Financial Stability And Future Sustainability.
- Increase Use Of The Facility By Golfers And Non-Golfers.
- Provide A Quality Experience For All Users.
- Exceed Customer Expectations By Providing Friendly And Helpful Customer Service.

These strategies were implemented in the Fall of 2019 and included:

- Reductions To Both The Operations And Maintenance Expenditure Budgets
- The Restructuring Of Pro-Shop Merchandise Management
- Reduction In Staffing Levels
- Modification Of The Volunteer Program And Associated Benefits

• More Consistent Application Of Operating Rules And Policies

The cost of operating the golf course with a history of running annual deficits has been the source of an active community conversation. In response, the City Council engaged a consultant firm experienced in evaluating publicly owned golf courses to examine the economic viability and operational practices at the HOGC. The study, conducted by Golf Business Advisors, was completed in April of 2021, and included some specific recommendations, including the following:

- Adjust Staffing And Supervisory Coverage By Naming Charlie Fultz The General Manager, Adding Supervisory Responsibilities To David Johns And Consider Hiring An Assistant PGA Pro
- Set Hours Of Operation From 7:00 Am To Dark (In Season) To Help Increase Golf Revenues
- Revise Program For Par Three Course With An Honor System For Additional Revenue
- Consider Additional Facilities And Uses Including: Races, Concerts/Movies, Pickleball, Putt-Putt Course And/Or Bocce Ball
- Discontinue Offering Season Passes With Carts And Increase Fees By 10% Per Year 6. Change To Limited Merchandise Program
- Change To New Point Of Sale System And Tie In GolfNow For Online Tee Times
- Offer Food And Beverage Service By Operating "In House"
- Develop Sales And Marketing Plan To Incorporate The Many Suggestions That Are Outlined Above
- Add Harrisonburg City Championships In Summer, 2021
- Establish Heritage Oaks Golf Association (With Full Tournament Schedule And Play Days)

In addition to concerns regarding the financial performance of the golf course, the community is clearly polarized around the perception that the golf course is a large community asset serving only a small segment of the population. The City has been publicly challenged to consider if a golf course is the most appropriate use of the land to serve the public good and in response turned to ULI Virginia for an objective look at the current and alternative uses for the 190 acres. As a result of this effort, ULI identified three fundamental, underlying issues and perspectives as to the value and community benefit of the existing golf course:

- 1. A Community Value Proposition Around The Role Of A Public Golf Course As A Community Asset And Discussion About How Best To Diversify The Portfolio Of Public Services To Address Pressing Needs To Serve Low-Income And Disadvantaged Populations
- 2. An Economic Issue With Respect To Operating Public Facilities Cost Effectively And Setting Expectations Related To The Cost-Benefit Of Those Facilities To Provide A Public Good
- 3. A Land Use Conversation Around The Most Appropriate Use Of The Property As Relates To Adopted Land Use Plans And Policies

QUESTIONS FOR THE ULI PANEL

The City of Harrisonburg posed the following questions to the ULI TAP panel, asking for expert advice and guidance relating to the prospects for the golf course property:

HOW CAN THE CITY BEST POSITION THE EXISTING HERITAGE GOLF COURSE PROPERTY, EITHER IN ITS CURRENT USE OR FOR FULL OR PARTIAL REDEVELOPMENT, TO ACHIEVE THE FOLLOWING:

- 1. Provide Maximum Benefit And Accessibility To All Local Citizens
- 2. Generate A Positive Financial Return To The City's Financial Position
- 3. Address The Adopted City Council Vision And Goals To The Maximum Extent Possible
- 4. Enhance Connectivity To Downtown

RELATED SUB-TOPICS FOR PANEL EXPLORATION INCLUDED THE FOLLOWING:

- What Is The Value Of The Heritage Oaks Golf Course As A Community, Or Regional Recreational Amenity?
- What Is The Market Potential Of This 190-Acre Property If It Remains A Golf Course? (eg.,. Tourism Potential Etc.)
- What Is The Market Potential Of This 190 Acre Property If Not Utilized As A Golf Course?
- What Are The Costs Related To Redevelop The Property Including Impacts To Expanded Infrastructure (i.e.,Water/Sewer, Stormwater/Ms4 Program, Schools, Etc.) And What Is The Impact To Community Access, Including The Garber's Church Shared Use Path?
- What Land Uses Are Appropriate And What Would A Master Plan For Redevelopment For This Property Look Like To Address The City Council Vision And Goals, And Expand Usage To The Whole Of The Harrisonburg Citizenry?
- What Is A Recommended Approach To Phased Development?



THE ULI TAP PROCESS

The TAP process began with a thorough review of briefing materials prepared by the City, including previous and current plans for the area, demographic information and trends, the recent Golf Course and residential market studies, and results from community surveys. Panel members toured the property, support buildings, and surrounding neighborhoods for land use context. With this information in hand, the Panel then interviewed stakeholders to better understand the current course usage, and community perspectives on land use, as well as any desired or missing assets in the community. The stakeholders represented a range of Harrisonburg constituents, including City staff, golf course management and maintenance personnel, neighboring residents, and community organizations. The findings from these interviews helped inform the panel as it considered the future of the course, alternative land uses, and recreation needs within the City.



III. ISSUE IDENTIFICATION

Issue identification is a two-part process involving listening to the community ("what we heard"), and then processing what we hear to extract the most critical, underlying issues ("key takeaways from what we heard"). What the Panel heard during our visit included input from City leadership, staff, community stakeholders, and the public participating in its online survey. The input gathered during the study was very diverse, and somewhat polarized, but could generally be characterized under a few common issues that seemed to capture the essence of the discussion. Following is a summary of what the Panel heard from the community, followed by those critical, underlying issues that appear to be foundational around the conversation about how the HOGC fits into the Harrisonburg community.

WHAT WE HEARD: EXISTING CONDITIONS

1. City Vision: What Guiding Principles Help Inform This Conversation?

As with all community planning exercises, it is important to reference adopted plans, policies, and overarching vision statements, all created with significant public input. Harrisonburg's Vision is to be the most ideal state of the City by 2039 and includes the following Vision and Priorities:

A CITY FOR ALL: This goal has direct relevance to HOGC as the community contemplates its role as part of a larger system of recreational services that are accessible and of value to a broad cross section of residents. While golf as a recreational option is not going to serve all people, it can be a part of the overall offerings for a comprehensive Parks and Recreation system.

ECONOMIC DEVELOPMENT: Goals, Gains & Growth: The City's brand as "capital of the Shenandoah Valley" is important, and the presence of a high-quality public golf course can be one component of an overall suite of desirable amenities to market on a regional scale.

A THRIVING EDUCATIONAL EPICENTER: The HOGC property has potential for creative and sustainable partnerships with the local K-12 schools as well as James Madison University and trade schools.

AVAILABLE HOUSING FOR ALL: The Comprehensive Housing Assessment and Market Study dated November 19, 2020 by Mullin & Lonergan Associates identified a gap between supply and demand across all income levels and housing product types. Potential redevelopment of the HOGC property to add housing inventory is a topic of conversation and addressed specifically in the ULI TAP findings and recommendations.

DISTINCTIVE, RELIABLE DELIVERY OF HIGH-QUALITY CITY SERVICES: The City is delivering a high-quality Parks and Recreation system to its residents. That said, the addition of activities that are targeted and more accessible to underserved populations is an important issue and relevant to the conversation about ways to increase participation across a wider band of the population.

FISCAL SUSTAINABILITY & PLANNING: A common theme around an evaluation of HOGC is the historical financial performance of the asset. Recent changes have resulted in improvement in this regard, but continued progress is key to demonstrate fiscal responsibility related to continued operations.

2. Community Values: Is The Golf Course A Valued Community Asset?

Heritage Oaks is a valuable component of a large Parks and Recreation system but is perceived by some to be elitist and a symbol of 'white privilege', although the Panel would not characterize this view as a majority opinion. For those detractors for whom golf is not an appropriate public amenity, the issue of financial performance and its burden on the City budget appears to be a lesser issue than the desire to convert golf to other land uses. For those people opposed to public golf, subsidizing that use, which is guite common for many municipalities, is more of an issue specific to golf because their view that it is does not serve a more diverse clientele. Stakeholder interviews and the community survey suggest that improved finical performance of the facility would not sway those that fundamentally desire golf to be removed as part of the Parks and Recreation offerings in the City.

On the positive side of this conversation, many municipalities value public golf courses as a key part of their Parks and Recreation portfolios. The HOGC is a very high-quality course and has received national recognition among municipal golf facilities. While that does not directly address the diversity issue, it is an important data point for future success and to reinforce the City's brand for providing a quality Parks and Recreation system. Economic Development uses this facility as one tool in its efforts to drive tourism dollars to the area and can offer the course as an additional perk for visiting families and corporations can do the same for business travelers. In addition, supporters highlight the community value in a First Tee program where about half of the participants are minority children and the program provides outreach and mentoring to first time offenders

A related question to the community asset proposition is whether golf is a sustainable recreation asset given participation trends and user preferences. Prior to the COVID-19 pandemic, there was an overall contraction in the golf industry. According to the National Golf Foundation, the golfing industry has seen an 11 percent cumulative contraction in golf course supply since 2006, "which has been disproportionately concentrated in value-priced courses (less than \$40 greens fee). In the last decade alone, there have been an estimated 800 golf course closures in the United States (R&A/ Trust for Public Land). The courses that remain are seeing a decline in usage, down from 30 million in 2009 to 25 million users in 2016 (National Golf Federation).

The year 2020 was a resurgent year for participation despite the number of golfers in the U.S. has been declining for more than a decade. Data from 2020 will likely represent an anomaly as many people turned to golf as a safer sporting alternative and opportunity to get outside with friends in a socially distant manner. Rounds were up almost 14%, with 60 million more played last year than in 2019 and the vast majority of those were at public facilities. It remains to be seen whether this resurgence will continue as the pandemic puts us in uncharted territory and signs of a different golf culture. However, the pre-pandemic world was already revealing changes in how people view golf and recreation in general, as illustrated by the growth of several new types of recreation and entertainment activities and venues that have surged into the public realm over the last decade or so. Consider the following list of activities that are common to most large communities today:

- Top Golf And Drive Shack Golf And Entertainment Venues
- Pickleball
- Footgolf
- Futsal
- Putt-Putt

Looking at this list, there are some common drivers supporting these trends. All the above, represent, in some form, a modified version of the original activity that a) occupies a smaller footprint and b) takes less time to participate. The underlying activities (golf, tennis, soccer, etc) are still in demand, but the value proposition related to cost and time has changed. Likewise, walking is the country's number one requested recreational activity and cycling participation rates have skyrocketed. These activities also benefit from the growing interest in sport and recreation that is inexpensive, supportive of healthy lifestyles, and not time consuming.

All of this does not dismiss regulation golf as a viable recreational activity. It does, however, help inform a conversation about how to utilize existing golf courses and alternative uses to make them more accessible. Looking forward isn't just a case of financial sustainability but of adapting, innovating, and reinventing the image and role of municipal golf courses. The City of Harrisonburg should explore options to help HOGC emerge as not only a place to play golf but as a community destination bringing people together for complimentary types of recreation and entertainment.





3.Asset Management: Can The Golf Course Be Financially Viable?

Heritage Oaks Golf Course helps address the City's vision of providing "a broad range of amenities." It is considered a premier municipal course and because of its quality, beauty, and location in the Shenandoah Valley, has potential to expand its user base. That said, the poor financial performance in the past is a valid target for evaluation and a key talking point for detractors. An underlying tone by critics of golf for that concern is the belief that while public recreation facilities with a more diverse user profile are commonly subsidized, a golf course should not receive the same financial support given a limited user group.

Progress has been made to bring the golf course closer to financial breakeven. If services that are given at significant discounts were accounted for as having been funded at cost, the course likely breaks even. For example:

- The Course Shuts Down So People Can Walk On The Cart Paths – This Is A Loss Of Revenue.
- The 40 50 Tournaments That Are Held There Annually, In Support Of The Local Non-Profit Sector, Are Sold At A Discount.
- The Par Three Course Is Open To The Community At No Cost.
- Harrisonburg High School Plays The Course For Free.
- Play For EMU And JMU Is Provided At A Discount.
- First Tee Receives Services From The Golf Course Staff With No Charge.

In addition to those items above, there are some additional costs associated with maintaining the quality of course that we see today. For example, the Bentgrass fairways are an upgrade for most municipal courses but carry some additional costs to maintain. The value of that feature can be debated but the reality is that it has some impact on quality, demand, and paid rounds from the golfing public. Financial viability and sustainability are also tied to how HOGC fits into an overall Economic Development strategy. The golf course is a regional attraction, in part due to the quality of the course as compared to its peers. The course is one amenity that can be offered to visitors associated with JMU or local busines travelers but does not appear to be a significant driver of overnight stays. There do appear to be greater opportunities to market the course as part of an overall strategy for outdoor tourism that brings in hikers, cyclists, kayakers, etc to the area. In addition, the clubhouse might provide opportunities to connect with the area's designation as an Arts and Culinary district and more alignment with JMU's business curriculums might make for stronger intuitional and corporate partnerships as would offering a partnership of age for James Madison University students and support for a JMU women's golf league. Finally, some simple off-site branding such as I-81 interstate signage for the golf course (p.45, Golf Course Business Advisors, April 1, 2021) and improved local wayfinding signage to the golf course can be helpful.





4. Land Use Issues: Should The Property Be Fully Or Partially Redevelopment?

There are two broad approaches to adding new activities to the HOGC property: 1) replacement of the golf course, in whole or in part, or 2) the addition of new elements within the property around the existing course. Redevelopment of the golf course is supported by those who believe the course itself is not an appropriate use and occupies land that could address other community needs. Redevelopment of the property to anything other than recreation uses would be inconsistent with the City Comprehensive Plan documents.

Adding new, complimentary uses and activities to the property takes the view that the property could be a greater community gathering place and destination for non-golfers.

There was strong support among citizens who responded to the community survey that the property remains a golf course. Despite that, many additional or alternative uses for the golf course, buildings, and residual property have been proposed including:

- Food Forest
- Affordable Housing
- Trails And Nature Parks
- Childcare
- Rehabilitation Services
- Elementary Schools
- Solar Farm

The City Parks & Recreation Department is committed to evolving with defined trends and to offer niche activities meeting the needs of a variety of user groups – skateboarding, pickle ball, futsal, puttputt, swimming, golf, etc. The HOGC property could potentially accommodate some of those activities with due consideration around the impacts associated with those activities.

5. Accessibility / Infrastructure (Parks; Transit; Traffic; Bike, Ped; Etc)

A community with great facilities and services is only as good as the connectivity and accessibility to take advantage of them. The recently constructed connection of the HOGC property to the Garber's Church Shared-Use Path is recognition of the importance of good connections and something the community should be proud of.

The City's Parks and Recreation infrastructure is well developed, and the HOGC property can benefit from its proximity to nearby public parks and trails. Enhanced connectivity, especially for pedestrians and cyclists, should continue to be a priority. This is also true with respect to access from downtown. There is limited bike infrastructure along the primary streets connecting to the property, even though the area is building a reputation as a destination for cyclists. With consideration for adding other recreational and entertainment options at HOGC, improvements to a multi-modal system connecting the site to more urban areas of the City should be viewed as essential to provide better access for those with limited transportation options. This includes enhanced transit service to the area.

WHAT WE HEARD: KEY ISSUES AND TAKEAWAYS

1. Financial Viability And Fiscal Responsibility

The Heritage Oaks Golf Course is an important part of the City's Parks and Recreation system. The quality of the facility is quite high, especially relative to its competition, and achieving regular financial performance close to break-even appears to be a realistic goal. Most Parks and Recreation assets are operated and supplemented using municipal funds and do not operate on a for-profit model. HOGC financials are trending in a positive direction toward selfsustainability but the City needs to establish realistic expectations for financial performance given its role in the overall system of services to the community.

For example, this value proposition might be applied to the decision to open the course for public use to walk the cart paths in the morning. This has been a popular activity meeting a demonstrated community need, but it is provided at a cost to the facility in the form of lost rounds and revenue. Likewise, the maintenance of Bentgrass greens represents a higher cost to maintain the course than conventional turf selections but provides for a unique and higher quality of facility that feeds into demand and recognition as a top-quality municipal course.

The panel heard data and anecdotal evidence about external influences potentially impacting financial sustainability of the golf course, including the increased participation rates during the COVID-19 pandemic and the financial challenges of local competition. The 2018 Virginia Outdoors Plan reported 10 to14 percent of the Harrisonburg region's population golfed. During the pandemic, golfing increased by 6.2 percent to 16 – 20 percent of the population (CNN, January 3, 2021). These factors might impact the future ability of HOGC to maintain or grow participation but should probably not be driving factors in near-term decision-making.

Even with improved financial performance, it is expected the detractors to the golf course as a land use may still not support it as a valued community asset because of deeply held opinions that golf is inherently an activity excluding minorities and disadvantaged populations. In this regard, the ULI Panel emphasizes this asset is but one piece of a Parks and Recreation system with a wide variety of assets that should not carry the burden of being all things to all people. The City has a wonderful Parks & Recreation system and should continue focus on serving all populations through a broad spectrum of assets giving attention to see that those facilities are appropriately located to best serve those populations. An aggressive economic development strategy is also an important part of long-term financial success. Corporate and institutional partnerships are critical, and support from James Madison University and Eastern Mennonite University should continue to be encouraged and expanded. Partnerships could increase with possible expansion into the First Tee program and/or other youth golf activities, as well as support for activities that may tie into course curriculums and provide valuable educational or internship opportunities. This could include implementation of a joint public relations plan for the golf course and the First Tee program to include golf and other planned activities at the course - (concerts, walks, concerts, and other public events). Partnerships with local schools for golf and disc golf to be included in physical education curriculums is another option.

With any redevelopment, or partial redevelopment, of the property there will be infrastructure costs to accommodate new land uses. Depending upon the development scenario, these costs might be the private developer's costs, the City's burden, or shared costs. The cost for these improvements cannot yet be determined but the following list includes the types of improvements that might be expected:

- Demolition And/Or Modifications To The Golf Course Infrastructure Such As Irrigation, Drainage, And Cart Paths
- New Public Streets
- Off-Site Road Improvements: Road Widening; Turn Lane Additions; Traffic Signals
- Storm Drainage: Additional Impervious Area With New Development May Require Modification To Existing And/Or New Stormwater Management Features To Mitigate Increased Runoff
- New ITInfrastructure
- Relocation Of Par 3 Course And/Or Maintenance
 Facilities
- Improvements To Deed-Restricted Area To Create Public, Neighborhood Park

2. PERCEIVED VALUE OF THE HOGC AS A VALUED COMMUNITY ASSET

The debate around golf as a valid community asset given a perceived lack of user diversity is a common theme associated with discussions around HOGC. The value of golf as a community recreation asset is subject to individual and collective perspectives of the community. When viewed as one element in an overall Parks and Recreation system, the HOGC plays a role to satisfy local demand for golf and golf-related activities and its regional appeal as a high-guality municipal course elevates its value and reinforces the City's brand. One approach to engaging a more diverse user profile at HOGC is to add complimentary activities that typically see higher participation rates among low income, minorities, women, and across a wider band of ages. A variety of trending recreation activities (i.e., Pickle Ball; Footgolf, etc.) and enhanced path connections from the property to Parks and Recreation facilities will further improve the HOGC as a community asset beyond golf. An enhanced sustainability plan and practices already in place at Heritage Oaks should be tied to the city's sustainability plan and made more public to highlight responsible property management practices and the role the property has in stormwater management. The panel recognizes that even bringing a more diverse user group to the property will not eliminate the concern of those that fundamentally believe golf is not an appropriate use of the land given the profile of its participants.

The First Tee program is an established national brand and appears to provide value to area youth, as well as a mechanism for corporate partnerships. The Harrisonburg Parks and Recreation Department, and the management team at Heritage Oaks, are also opening the course to a broader range of users by offering activities beyond golf such as allowing residents to walk the course, attend concerts and movie nights. This expands the number of people who can enjoy City-owned open space and facilities, making Heritage Oaks more of a public amenity than most other public golf courses. The City conducted a survey prior to the ULI TAP program to help the City, and the ULI panel, better understand the community perspective of the HOGC as a community asset. As with all surveys, the construct of the guestions, the sample size of responses, and profile of those responding will impact results but it does provide some interesting data points for consideration. At a very high level, it can be said that survey results were quite polarized. There seems to be general agreement about priority community needs (housing, trails, outdoor space, entertainment venues, playgrounds, etc.), but not overwhelming support for changing the land use of the HOGC property to address those specific needs. A majority (58%) indicated the HOGC was a community asset but there was a relatively even split between supporters of the facility continuing as-is. However, when asked a different way, there was a significant tilt toward not redeveloping the property for other uses and leaving the regulation golf course in place.

3. LAND USE ALTERNATIVES: POTENTIAL FOR REDEVELOPMENT AND ALTERNATIVE LAND USES

LAND USE CONSISTENCY: The first reference for evaluating land use compatibility is the City of Harrisonburg Comprehensive Plan, specifically the Future Land Use Map found in the plan. These plans have been developed with significant public input and the plan designates the Heritage Oaks site as a Parks and Recreation use. That land use designation, in the view of the ULI Panel, is appropriate for a golf course in a non-urban setting that is supported by adjacent residential uses, does not rely on public transportation, and is easy to get to by car from surrounding locations. Adopted plans are intended to provide guidance and can change over time, but any consideration for significant land use changes should consider if there are defined changes in land use patterns or public need that would justify a plan modification.

RESIDENTIAL LAND USE: Affordable housing was the most popular idea amongst the interviewed stakeholders in favor of replacing the golf course. Like any other land use, affordable housing must be located properly to best serve those residents. Lowincome families typically have pressing needs around access and transportation options to employment, shopping, healthcare, and professional services. Unfortunately, many residents of affordable housing lack a reliable means of personal transportation, and thus rely on public transit or the ability to walk to these destinations. Harrisonburg does not yet offer a robust public transit option serving Heritage Oaks. A bus stop for Route 3 does exist near the property, but buses only come once an hour¹ and there are limited employment options within the ideal walking distance of ¼ of a mile. Transit availability and frequency is critical to families with children as they work to schedule around school bus routes, pick-up and drop-off times, and daycare hours.

In effect, building affordable housing on the Heritage Oaks property might simply further inequitable development patterns seen across the country. Our suburbs are seeing a rise in poverty rates as low- and moderate-income urban dwellers are being displaced by rising housing costs and forced to move to the suburbs to find affordable housing. They then become isolated because of the lack of transit access to employment, services, familial and social networks, healthcare, and entertainment. These issues must be understood and planned for as part of an intentional City strategy for housing where location is the critical factor in that process for access to key infrastructure (transit, city supportive services, employments opportunities, quality of life measures, etc.). The ULI Panel suggests that the HOGC property would be a very challenging location in this regard and may not be an effective location to

address affordable housing.

The recent housing study for this market also identified demand for more housing at moderate and higher prices so any consideration of incorporating housing at HOGC should not be limited to affordable housing only. The addition of moderately priced housing can free up more affordable housing that is currently occupied by moderate to high income families and the HOGC property would be better positioned for that product.

NON-RESIDENTIAL LAND USES: While residential uses would seem to be most appropriate, many other land uses have been proposed and in broad terms can be considered as either land-intensive uses requiring redevelopment of the golf course or small, complimentary uses to be incorporated around existing golf. Light industrial, office or institutional land uses like warehousing, distribution, or schools might be suitable in an overlapping zone of suburban residential patterns and rural/agricultural uses as exists along Garber's Church Road. These uses are more intense and would require careful planning to mitigate impacts to adjacent residential uses and assess the impacts on traffic and the need for off-site road improvements.

The potential for quality commercial development for the property probably lacks enough significant frontage and visibility to be successful and any opportunity might be limited to more destination-type uses along Market Street. In a complete redevelopment scenario, it is possible that some small neighborhood retail might be appropriate along Market Street, but it would need to capture customer traffic from beyond the property to be successful. In general, the potential for any retail seems to be very minimal, absent some type of destination use (i.e., boutique grocer; craft brewery; etc). A small footprint for professional office might be another opportunity in that location and an appropriate transitional use near residential areas.

^{1.} Attempts were made to use the Harrisonburg Department of Public Transit myStop website and Google Maps to measure the time it would take for a resident to travel to popular destinations, but the systems do not even recognize that Route 3 runs by the golf course. A manual use of the HDPT website estimates a trip to Harrisonburg Crossing would take about 45 minutes, Eastern Mennonite University about 55 minutes, and Sentara hospital about 100 minutes.

COMPLIMENTARY LAND USES: The quality of Heritage Oaks Golf Course makes it a regional attraction for golfers. However, the property offers limited options as a destination for the non-golfing public. Many ideas for the addition of new activities that might appeal to the non-golfing public have been offered, some of which are simply programmed events, while others require land and new infrastructure. The benefits for adding new activities might be twofold: 1) provide additional revenue sources; and, 2) reach a wider user profile of the non-golfing public, particularly minority and underserved populations. Adding new facilities around the regulation golf course would increase the function of the golf course property as a functional neighborhood park and peripheral uses could serve surrounding neighborhoods and schools. These uses would help bridge some shortfalls (ref. Table 2 of the Parks and Recreation Master Plan) and might include the following types of activities:

- Putting Green
- Disc Golf
- Playground
- Community Garden
- Expanded Shared Use Trails

Other complimentary uses could be targeted toward specific age groups or minority populations with cultural preferences toward other recreational activities such as:

- Pickleball
- Putt-Putt
- Futsal
- Footgolf

Other uses may benefit from enhanced connections to existing amenities such as the addition of disc golf within or adjacent to the property and broader connectivity to the multi-use trail. A putting skills course might attract younger age groups and seniors not ready or interested in tackling regulation golf. The golf cart paths can provide universal accessibility options during off-hours as an expansion of the early access program already in place.





ENVIRONMENTAL EDUCATION LAND USES:

The HOGC could present opportunities to incorporate public-facing environmental education and sustainable energy practices, without significant changes to existing facilities. These could be value-added elements to broaden the mission and purpose as a community asset, provide a visual connection to sustainable practice for the public, and provide some amount of financial benefit.

For example, the property receives a significant amount of stormwater runoff from a large drainage basin and can capture and treat that runoff within the context of a golf course much easier than on a developed site. Golf courses are sometimes perceived to be "bad for the environment" because of their use of fertilizers and irrigation, but modern maintenance practices have evolved to help mitigate those impacts. Heritage Oaks serves as a natural stormwater Best Management Practice because of its location, collecting runoff from upstream, including adjacent residential neighborhoods and Bluestone Elementary School, which is then filtered through turf grass and the pond, helping mitigate the ecological impacts of development.

Potential improvements could include the following:

- Add Solar Panels To Club, First Tee, And Maintenance Facilities
- Add Wind Generators On Site
- Add Landscaped Infiltration Systems, Rain Gardens, Constructed Wetlands And Low-Impact Development Measures To Treat Stormwater
- Add Electric Car Charging Stations
- Implement Integrated Pest Management
 Practices
- Maintain Audubon Certification And Add Interpretive Elements Around Amateur Birding

Finally, the idea of a solar farm has been offered as part of redevelopment scenarios. Perhaps a small installation with a redevelopment plan would make sense, but wholesale replacement of open space with solar panels could have a negative impact on the adjacent property values, as their natural views would be diminished. Additionally, small scale installations fail to attract interest from the solar development community so it would likely be a small element of an overall sustainability theme and not a significant source of energy or revenue.

From a pure land use perspective, the ULI Panel unanimously agreed that the golf course is properly located and support for redevelopment would likely be based upon opposition to golf as a community asset rather than golf as an appropriate land use in this location. It was also noted that there is an inventory of vacant and undeveloped land in the vicinity of HOGC. These are properties in private ownership, but they might present some future opportunities in the same geographic area to address some community needs, including housing, without redevelopment of the existing HOGC asset.



IV. SCENARIO DEVELOPMENT AND RECOMMENDATION

USING THE BACKGROUND INFORMATION, OBSERVATIONS FROM TOURING THE AREA, THE COMMUNITY SURVEY, AND STAKEHOLDER INPUT, THE PANEL APPROACHED SCENARIO DEVELOPMENT WITH THE FOL-LOWING GUIDING PRINCIPLES IN MIND.

GUIDING PRINCIPLES FOR SCENARIO DEVELOPMENT

- 1. Focus On Land Use And Mitigate Negative Impacts On Adjacent Land Uses
- Respect The Environmental Assets And Enhance Sustainability Where Possible, And Maintain The 35-Acre Deed-Restricted Parcel For Recreational Use
- Assess Potential Changes To Attract And Accommodate A Broader, More Diverse User Population And Position The Clubhouse As A Community Amenity
- Focus On Green Infrastructure And Linkages Between The Property, Residential Areas, Downtown, And Other Park Facilities Including Bike, Pedestrian, And Transit Options.
- 5. Enhance Partnerships With Local And Regional Organizations And Educational Institutions
- 6. Expand Market Outreach And Brand As A Regional Asset

Each scenario reflects the various community perspectives heard during the TAP process but fundamentally rely on sound land use planning principles supported by the collective experience of the Panel and ULI principles for responsible land use. Each scenario references how each approach to land use should address the role it serves within the community to enhance the quality of life of its citizens, address financial sustainability and be a valued asset as a part of a broad portfolio of community services. In addition to the continued use as a recreational amenity, this study assessed potential alternative land uses including other recreational uses, commercial use, and new residential development.. The list of alternatives is certainly not exhaustive, and we encourage the evaluation of creative solutions with consideration for potential impacts to existing golf operations, adjacent land uses, and accessibility.



Scenario #1: Retain And Enhance

Under this scenario, the regulation 18-hole golf course would be retained with a focus on improved management practices supplemented with new destination activities to increase exposure and accessibility to a broader user group. Uses to coincide with the golf course should be carefully considered to address the changing trends in outdoor recreation while maintaining a destination golf course. This approach includes the following recommendations and guidance:

- Implementation Of Simple, But Effective Food And Beverage Service
- Continued Improvement Of Pro Shop Management
- Continued Improvement Of Maintenance Operations Toward Overall Financial Sustainability
- Enhanced Marketing And Branding Strategies

 Expand Community Partnerships With Major Corporations, Small Business, And Institutions Including JMU
- Build On The Local Brand As A Hub For Local And Regional Arts And A Culinary District – This Could Include Rotating Art Exhibits, Art Classes, Healthy Cooking Classes, And Farm-To-Table Menu Items.
- Consider Enhanced And Public-Facing Environmental Features And Education – Interpretive Signage Can Educate And Explain How Stormwater Management Features Work, Identification Of Flora And Fauna Found On The Property, And How Integrated Pest Management Programs Work
- Evaluate Additional Activities Complimentary To Golf Operations That Might Appeal To A Broader Population Base Such As:
 - Increased Access To Walkers And Cyclists
 - Live Music Events
 - * Trending Recreational Activities:: Pickleball

Futsal Footgolf Putt-Putt Drive - Pitch – Putt Competitions



With the addition of any new activities on the property, it is important to consider the impact on parking, traffic, noise, and collateral impacts to the other users on the site, clubhouse functions and daily operations. Associated with this scenario are options for the City to retain or assign responsibility for management of the golf course operations to control costs or limit liability for operating losses. These options may include sale or leasing of the golf course and third-party management models. Both options involve some protection against financial losses but also loss of control over quality and use of the property without specific contractual provisions with the buyer or third party to address these issues.

In the absence of any change to management of the golf course, it seems that the recommendations put forth in the <u>Golf Course Study</u> are reasonable and generally supported by the HOGC General Manager and staff.



Scenario #2: Modify And Repurpose

This approach would recognize the value in retaining a quality golf component as part of the overall public Parks and Recreation system but reduce the golf course footprint to a modified 9-hole course on about 140 acres and redevelop the balance of the property with primarily residential housing product. The par 3 course may be relocated in this scenario adjacent to the First Tee program building, which would remain in operation.

A minimal amount of neighborhood commercial could be considered along the West Market Street frontage, but only if supported by market analysis. It is important to note that this approach would not be consistent with the City Land Use Plan and still must preserve the 35acre deed-restricted area designated for recreation use. The panel cautions that the residential product most appropriate for this location may not include some types of affordable housing given poor accessibility to transit, goods, and services but could add needed inventory to other types of housing identified in the Comprehensive Housing Assessment & Market Study completed November 19, 2020 by Mullin & Lonergan Associates. This scenario could also maintain the First Tee facilities as a valuable community asset.

This approach should be preceded by a professional market analysis to validate the market demand for a modified golf course to determine financial feasibility. The demand and participation rates for modified golf facilities is significantly different than regulation courses and it is likely the 9-hole course would not generate as much revenue as the existing 18-hole course. There are also significant capital costs for infrastructure improvements to modify the golf course that need to be considered. Development of the 50-acres fronting West Market could provide a one-time boost to the local economy, but the cost to relocate the facilities may exceed the sales value of the land.

Scenario #3: Redevelopment

Complete redevelopment of the entire property (excepting the 35-acre deed-restricted area) is a scenario that has been promoted by some members of the community. The City would need to consider the inconsistency with adopted land use plans and the impact of new development to existing, established residential neighborhoods adjacent to the property. In addition, traffic impact studies would be necessary to assess the impact of what would likely be a significant increase in trip generation from proposed residential uses. Like any partial redevelopment, market data should be relied upon to determine the appropriate types of residential products suitable for this location. In this scenario, the proposed 35-acre park functions as a neighborhood park. A trails network could be planned throughout the new development connecting to surrounding parks.

Some opportunities with redevelopment would include enhanced connectivity through the site via a residential street network in addition to the new housing inventory. Any redevelopment must preserve the 35-acre deedrestricted parcel designated for recreation use which presents an opportunity to connect that area with the new shared-use trail and the planned residential street network. Like Scenario #2, The First Tee program and associated facilities could be reconfigured but maintained as part of any redevelopment.

The Scenario Performance Matrix

The Panel created a tool for evaluating the performance of each Scenario against some common community planning goals and the City's defined Vision and Priorities. It is acknowledged that this tool is imperfect, and subjective in many ways, but perhaps helpful to the discussion when considering the potential impacts of each approach. The color coding relates to how well each scenario might perform against goals:

GREEN = SUCCESSFUL YELLOW = MODERATELY SUCCESSFUL RED = LESS SUCCESSFUL

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| | Scenario 1 | Scenario 2 | Scenario 3 |
|---|------------|------------|------------|
| Supportive of City Goals | | | |
| Consistent with adopted long-range plans | | | |
| Expands recreation offerings | | | |
| Limits burden on City budget | | | |
| Create additional housing inventory | | | |
| Promotes environmental sustainability | | | |
| Supports connectivity | | | |
| Reduces impact on community infrastructure | | | |
| Mitigates impact on neighbors | | | |

At a glance, this assessment suggests that Scenario 1 is overall more successful at addressing the stated goals, and complete redevelopment (Scenario 3) less successful overall, subject to personal interpretations. Accounting for this subjectivity, there are some interesting concepts to consider from this type of analysis:

- Any Scenario Could Be Argued To Be In Alignment With City Goals, Depending Upon Which Goals One Selects As Guiding Principles And Depending Upon How Successfully The Plan Is Implemented.
- Any Redevelopment Options Are Objectively Not Consistent With Current Adopted Long-Range Plans.
- With Improved Management Practices, Scenario 1 Can Limit Undo Burden On The City Budget. However, Redevelopment With Residential Uses Would Be A Negative Impact In That Regard As Residential Uses Are Particularly Burdensome On City Infrastructure And Services.
- Environmentally, Scenario 1 Inherently Performs Better With A Greater Net Pervious Area And Vegetation, Generating Less Stormwater Runoff Than Developed Solutions.
- The Redevelopment Scenarios Also More Prone To Impacting Established Residential Neighborhoods Adjacent To The Property Including Visually, Environmentally, And Traffic. However, They Do Offer Potential For Enhanced Connectivity Through The Property With The Creation Of New Paths And A Connected Residential Street Pattern
- The Obvious Benefit To Redevelopment (2 And 3) Is The Gain In Housing Inventory.





V. CONCLUSION

Harrisonburg is referred to as "The Capital of the Shenandoah" with a regional brand as a destination to live, work and play. Residents and City leadership are proud of their community and want to ensure the underlying reasons for that pride extend to all its residents. The City is proud of the quantity and quality of its current Parks and Recreation offerings with 19 parks that meet different needs of the community. The discussion around the use of the HOGC property as a part of that system consistently gravitates toward two areas of concern:

- Financial Performance Of The Asset
- Perceived Lack Of Accessibility Or Benefit Of This Asset To Underserved Populations

The question of financial viability has two perspectives, both of which appear to have reasonable solutions, depending upon community expectations. The first perspective suggest that the recent progress made to improve management of the facility is bringing the golf course closer to an acceptable level of performance and a minimal annual operating deficit. The second perspective depends upon expectations for performance. Should the community demand that the asset be a financially self-sustaining enterprise, then there are several approaches for achieving that, as discussed in the scenario outlines. However, it is important to understand that on a national scale it is common for municipal golf courses, and Parks and Recreation facilities across the board, to require some level of subsidy as the cost to provide valuable public services. Regardless, continued follow-up with many of the strategies noted in the June 17, 2021 Golf Business Advisors report by Chris Hartig is recommended toward improving the golf course financials.

The value of the HOGC as a community asset that is accessible to all is something that the community must arrive at based upon the local culture and values. These values are, in part, embedded in the City's vison statements and planning policies. In that regard, the comprehensive planning documents suggest that the HOGC represents an appropriate land use. The City has identified many pressing needs for community services, infrastructure and housing and a valid response to those needs is to evaluate how, and where, to best address those needs. However, opposition to the golf course as an amenity serving a limited and privileged segment of the population should not lead to a conclusion that redevelopment for affordable housing or other uses targeted to serve underserved populations is appropriate in this location. The land use context suggests that the disconnect from access to critical goods and services would not make this site a logical candidate for meeting the needs of low-income families.

The panel did not hear anything from staff or from the community survey suggesting a strong preference that the golf course be used for a different kind of park. The course is a high-quality course relative to its peers (locally and nationally) and brings positive attribution to the community from the broader region. The panel suggest not putting too much pressure on this one asset to do too much with respect to solving other worthy community needs and priorities. That said, intentional efforts to add variety to the recreation options within the HOGC property to expand the user base across a broader profile of residents should be continued in earnest.

Ultimately, the Panel felt that the golf course was an appropriate land use, in the right location and a valuable community asset. With that in mind, there are several areas of focus that are recommended:

- 1. Continued Focus On More Efficient Management And Operations Practices To improve Financial Performance
- 2. A More Aggressive Marketing Strategy, Including Stronger Educational, Corporate, And Institutional Partnerships
- 3. Continued Efforts To Provide New Activities On The Property To Increase Participation Among A Broader User Group

References (In order of reference)

CNN, January 3, 2021) City of Harrisonburg Parks and Recreation Master Plan 2018 Virginia Outdoors Plan Golf Course Business Advisors



ABOUT THE PANEL



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A native Virginian, Sal has 40 years of land planning and urban design experience for a portfolio of projects around the US and abroad including comprehensive plans, mixed-use development, master planned communities, parks and recreation planning and design, and golf course design. Sal is the past-Chair Chair of the Urban Land Institute Virginia District Council and a member of the ULI Urban Revitalization Product Council.



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With more than 18 years of planning, economic development, and real estate experience, Jessica brings a comprehensive perspective to all consulting assignments with Kimley-Horn. Her involvement provides clients with detailed insights into demographic and development trends as well as the fiscal implications of different growth scenarios. She works on a wide variety of comprehensive planning and economic development assignments for local governments and regional agencies. Developer and investor clients also rely on Jessica's insight to determine demand for commercial and residential projects and to choose specific concepts to maximize marketability and value. As a national resource for Kimley-Horn, Jessica participates in assignments across the United States



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Tim R. Rose has worked with the University of Virginia since 1987, and is Chief Executive Officer of the University of Virginia Foundation, steward of approximately 5,200 acres for the University, with assets valued at approximately \$700 million. Prominent properties include the Boar's Head Resort, Birdwood Golf Course, Morven Farms, and North Fork - A UVA Discovery Park. The Foundation is active in the acquisition of properties for UVA and manages the University's real estate gift program. In addition to these real estate projects, the Foundation provides shared services to other University-related foundations and assistance to the University's Capital Campaign.



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