



# APPENDICES

# HISTORIC OAK HILL STATE PARK FEASIBILITY STUDY

**REPORT TO THE VIRGINIA DEPARTMENT OF CONSERVATION AND RECREATION**  
**APPENDICES - SUPPORTING DOCUMENTATION**

**MARCH 1, 2025**





# TABLE OF APPENDICES

The appended studies presented herein provide supporting subject matter analysis informing the findings of the Oak Hill State Park Feasibility Study – Summary of Findings.

## APPENDIX A – OAK HILL FUNDING MODEL AND ESTIMATED PRESERVATION COSTS

An assessment of potential revenues and anticipated expenditures to establish and manage a future Oak Hill State Park.

- A1** Oak Hill Funding Model (With Source/Reference Information) – *STACH pllc*
- A2a** Oak Hill Estimated Landscape & Site Preservation Costs – *STACH pllc*
- A2b** Oak Hill Estimated Architectural Preservation Costs – *JKOA Historical Architects*

## APPENDIX B – LANDSCAPE AND ARCHITECTURAL CONDITIONS ASSESSMENT

A concise summary illustrating reconnaissance-level analysis of Oak Hill’s extant landscape and architectural features. Resources are categorized in conformance with the Secretary of Interior Standards, and organized by landscape character areas/zones; buildings are numbered by National Register/National Historic Landmark identifiers.

- B1** Oak Hill Preliminary Cultural Landscape Assessment – *STACH pllc*
- B2** Oak Hill Architectural Resource Inventory – *JKOA Historical Architects, Brockenbrough Arch./Eng.*
- B3** Oak Hill Landscape Character Area & Building Inventory Maps (Property-Wide & Historic Core)

## APPENDIX C – ARCHAEOLOGICAL ASSESSMENT – MANAGEMENT SUMMARY

A concise summary of archaeological analyses assessing known archaeological resources, sites of missing/lost features dating to the historic period, and locations of high probability of archaeological resources. – *William & Mary Center of Archaeological Research*

## APPENDIX D – HISTORICAL TIMELINE

A concise listing of documented historical periods, events, and persons associated with Oak Hill’s history.

- D1** Oak Hill – Historical Timeline and Narrative Description – *Brian Martin, PhD*

## APPENDIX E – COMPARATIVE ANALYSIS

An assessment of historical/recreational parks and sites comparable to the resources and recreational offerings possible at Oak Hill. – *Carlyn Swaim, Stephanie Mathew, STACH pllc*

- E1** Oak Hill Comparative Analysis Narrative Summary
- E2** Comparative Analysis Matrix

## APPENDIX F – POTENTIAL FUNDING STREAMS

A listing and description of funding sources for consideration supporting initial and long-term operations and programming. – *Stefanie Mathew, Carlyn Swaim, STACH pllc*

- F1** Oak Hill Potential Funding Streams Narrative Summary
- F2** Matrix of Potential Funding Streams

## APPENDIX G - ENGAGEMENT

A summary of recommendations for engaging partners, stakeholders, and interested parties in the park’s early development. – *Brian Martin PhD, STACH pllc*

## APPENDIX H– LIST OF RECOMMENDED STUDIES

A listing of future studies and investigations recommended to inform park development master planning and resource management. – *STACH pllc, Brockenbrough*

# METHODOLOGY

As envisioned in early 2024, the Virginia General Assembly charged the Virginia Department of Conservation and Recreation (DCR) to:

*...conduct a study of the potential acquisition and development of Oak Hill, the former home of James Monroe, the fifth President of the United States, as a state park. The study shall (i) assess the challenges in acquiring and developing the property, (ii) identify upfront costs and ongoing and future obligations of the Commonwealth, (iii) assess the involvement and contribution of Loudoun County, where the property is located, and (iv) assess potential philanthropic contributions and/or other [contributions].<sup>1</sup>*

The analysis presented within these *Appendices* to the *Oak Hill State Park Feasibility Study* provides the detailed basis for establishing an Oak Hill State Park first presented in a companion *Summary of Findings* delivered to the Virginia Department of Conservation and Recreation in early January of 2025.

Conducted by a multidisciplinary consultant team of preservation landscape architects, historical architects, engineers, archaeologists, historians, and strategic consultants, these findings are informed through site-resource observations, conditions assessments, and projected cost analyses in consideration of Oak Hill as a potential future state park. A review of trends from other state, regional, and national comparable sites informed the project's potential. Subject matter experts in fundraising and programming interviewed constituents, and worked to assess revenue streams and organizational models that authentically align with the resources and experiences of this timeless landscape and leverage the strength of DCR's leadership in recreational park management and natural resource management.

As project lead, STACH pllc preservation landscape architects and planners led the project design, analysis, and synthesis of findings, beyond lending subject matter expertise to the analysis of the natural and cultural landscape. Significant contributions to the project team include, Brockenbrough Associates (architects and engineers), Joseph K. Opperman Historical Architects, the William and Mary Center for Archaeological Research (WMCAR), and subject matter experts in history, programming, and strategic services by Brian Martin, Carlyn Swaim, and Stefanie Mathew. The findings were further rounded out by and detailed expertise from historic rehabilitation cost estimation contractors supporting JKOA and STACH's assessment of preservation costs.

These *Appendices* serve as a companion document to the January 2025, *Oak Hill State Park Feasibility Study, Summary of Findings*. Additional materials, including reconnaissance photos, mapping, and the detailed reporting of the study's archaeological assessment by WMCAR, are provided to DCR to inform further consideration of this **exceptionally significant and well-maintained landscape and its supporting natural and cultural features.**

## ADDITIONAL PHOTO CREDITS (NOT OTHERWISE SOURCED)

Cover Image: Photo of the Little River west of the historic core. Photo courtesy STACH pllc, 2024.

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<sup>1</sup> SB30 Item 360M, 2024.

# APPENDIX A: FUNDING MODEL AND ESTIMATED PRESERVATION COSTS

An assessment of potential revenues and anticipated expenditures to establish and manage a future Oak Hill State Park are presented herein on the accompanying spreadsheets.

## APPENDIX A1 – OAK HILL FUNDING MODEL

"Appendix A1 Oak Hill Funding Model" presents justification for the projected revenues and costs first presented in the *Summary of Findings* and expanded upon in *Appendix F*. This table presents the projected revenues and costs for the first five years of the park's development and estimates average expected revenue and costs for Years 6-10. Source information substantiating the comparative analysis and projected costs are presented in the columns to the right of the table. In descending order, the table presents the following:

- **Startup Grants, and Revenues** are confirmed at \$52 million dollars. Following the \$22 million purchase price (paid for by a grant from Loudoun County), the remaining balance will establish a \$20 million endowment, with an additional \$10 million in cash reserves. **Year-Over-Year Revenues** follow and reflect conservative estimates based on the comparative analysis presented in *Appendices E and F*, and reflect trends observed across comparable state- and privately-run parks and historic sites.
- **Acquisition and Operating Expenses** are shown to reflect predictable costs of comparable parks and leverages the proven management operations of Virginia State Parks, while building capacity for an official Friends Group to the future park that will support volunteer programming including tours, education, and outreach. These costs are further offset by analysis provided in *Appendices F and G* identifying measures for engagement of stakeholders to establish an official Friends Group for the park.
- Lastly, **Capital Expenses** reflect the study team's analysis of necessary preservation costs to preserve and make operational site and structures, across the Oak Hill landscape. Initial activation costs reflect the study team's recommendations to invest in park access, parking, and trail amenities, early in the park's creation to afford public access while the balance of the park's land is further planned and activated.

The funding model as presented, demonstrates a conservative approach to estimated revenues well-informed by comparative analysis; reflects industry-accepted standards for endowment fund management with reasonable projected growth year-over-year; projects operating expenses at levels common to comparable-sized parks and sites; and projects capital expenses based on the expert analysis provided by the study team, identifying the actions required to preserve and provide access to Oak Hill for generations to come.



**APPENDIX A2 – OAK HILL ESTIMATED SITE AND BUILDING PRESERVATION COSTS**

*"Appendix A2 Oak Hill Estimated Site and Building Preservation Costs"* presents the projected capital costs for Oak Hill's site and building preservation. These projected costs reflect the study team's on-site observations of Oak Hills buildings and landscape features and are organized by the landscape character areas that organize the property into park zones (*See Appendix B*); preservation costs for each building and site feature are listed within their respective area/zone.

The total estimated costs for years 1-10 for site and building preservation is roughly \$8.5 million. In addition, there is an estimated \$3.8 million in preservation costs for non-priority structures (sheds, ancillary buildings, etc.), which are not deemed critical for park operations.

The combined total costs for site and building preservation is totaled at the bottom of each spreadsheet *Appendix A2*, and these costs are accounted for (with margin allocated for inflation or increase) on the first two line-items listed under "Capital Expenses" on *Appendices A1 Funding Model Spreadsheet*. It is also worth noting that *Appendix A1* also contemplates a \$2.5M spend in years 6-10 to expand development of new resources for the park in alignment with a forthcoming Park Development Master Plan.

## OAK HILL STATE PARK - FUNDING MODEL

Updated January 3, 2024

Revenue		FY 2026 Year 1	FY 2027 Year 2	FY 2028 Year 3	FY 2029 Year 4	FY2030 Year 5	Average Revenue & Expenditures Yrs 6-10	Reference:	Notes:	
Contributed Revenue (Acquisition - Endowment Creation)										
LWCF*		\$	6,000,000.00					TCF Projections Dec 2024	Funds fully received/obligated at the time of this study	
VLCF*	\$	2,000,000.00						TCF Projections Dec 2024	Funds fully received/obligated at the time of this study	
Local Government (Loudoun County)*	\$	22,000,000.00						Grant Awarded/Approved By Loudoun County Government	Funds fully received/obligated at the time of this study	
Mitigation**	\$	7,000,000.00						TCF Projections Dec 2024	Funds fully received/obligated at the time of this study	
Private Philanthropy**	\$	5,000,000.00						TCF Projections Dec 2024	Funds partially received/obligated at the time of this study	
State Parks NGF0265*	\$	10,000,000.00						DCR Projections Dec 2024	Reflects DCR Projections December 2024	
(* Denotes funds fully received, obligated) (** Denotes funds partially received, obligated)										
Management Fund - Endowment Payout										
Management Fund Endowment - Interest Payout (4.5% Annually)		\$	1,002,000.00	\$	1,292,200.00	\$	1,312,700.00	\$	1,337,600.00	
Contributed Revenue - Philanthropy										
Membership, Philanthropy, Sponsorship	\$	150,000.00	\$	230,000.00	\$	310,000.00	\$	345,000.00	Membership Comps reflect tiered membership annually from \$50 - \$500 annually (Yield in revenue is varied, from \$32K Gunston Hall - \$2M at Mount Vernon)	
Grants Revenue (Contribute to Capital and Program Costs)	\$	250,000.00	\$	250,000.00	\$	250,000.00	\$	250,000.00	Philanthropy/Sponsorship based on a conservative \$300-350K/yr. New Contributed Revenue Target (Friends Group)	
Earned Revenue - Fees, Rentals (Etc.)									Grant activity projected for both DCR and Friends Group; recommend national promotion/PR to pursue 250-Related Funding, NPS, America250, VA250 for FY26, FY27, and beyond	
Ticketed Admissions- Historic Core (Special Tours, Events, Etc. Gardens & Grounds, vs. House Tours)			\$	100,000.00	\$	200,000.00	\$	375,000.00	\$15 Admission Fees - Special Events @ 25K visitors annually by year 5 (visitation comps range from Highland 50K - Montpelier 125K)	
Parking Fees - Non Historic Core @ \$10.00/Car	\$	350,000.00	\$	500,000.00	\$	750,000.00	\$	1,000,000.00	Conservative projections, does not include a significant A250 anniversary event or other notable anniversaries within first five years.	
Tenant Houses (6 of 11 Available for Accommodations)	\$	360,000.00	\$	390,000.00	\$	427,000.00	\$	466,250.00	\$10.00 per Car @ 100,000 cars annually to non-historic core by year five. Estimated 2.5 persons per car = 250,000 visitors annually by year five (DCR Nova Comps @250,000 visitors by year 5 (Ex. Sky Meadows over 260K visitors yrs 2017, 2020)	
Event Rental (Special Use Permits)				\$	10,000.00	\$	15,000.00		6 of 11 for Accommodations (300/night); 3 Long Term Rentals, 2 Staff Housing (Comps based on regional overnight stay costs Nova Air-B&B)	
Merchandise/Retail				\$	50,000.00	\$	60,000.00		Very conservative projection of limited event rentals early on (gardens/grounds initially). Loudoun area comps are much higher, with weddings/event rental fees (facility only) whose average costs exceed \$20K per event (Source Visit Loudoun).	
Farmland Lease Income	\$	50,000.00	\$	50,000.00	\$	50,000.00	\$	50,000.00	Merch/Retail Beginning by Year 4, fully operational by year 5. Opportunity for 250th for commemorative Merch (Source - DCR Merch Comps)	
									NASS \$42/Acre in Loudoun Co.@ 50% of 1,200 acres: Owner Currently yields \$80K/yr.; Final Projection is \$50/acre/yr.	
Total Contributed & Earned Revenue	\$	46,000,000.00	\$	8,162,000.00	\$	2,812,200.00	\$	3,359,700.00	\$	3,898,850.00
Acquisition & Operating Expenses	FY 2026 Year 1	FY 2027 Year 2	FY 2028 Year 3	FY 2029 Year 4	FY2030 Year 5	Average Operating Exp. Yrs. 6-10				
Acquisition Costs	\$	(22,000,000.00)						TCF Negotiated/Projected Costs	Per TCF projected costs, November 2024	
Operating Expenses - DCR										
Staffing & Non-Personal Services (Phased Hiring - 7 FTEs by Year 3)	\$	(544,800.00)	\$	(908,000.00)	\$	(1,271,300.00)	\$	(1,271,300.00)	\$	(1,271,300.00)
Equipment & Equipment Maintenance	\$	(333,000.00)	\$	(245,800.00)	\$	(107,600.00)	\$	(107,600.00)	\$	(107,600.00)
Utilities/ Gen Maintenance & Repair (Non Capital Improvements)	\$	(70,000.00)	\$	(60,000.00)	\$	(50,000.00)	\$	(50,000.00)	\$	(50,000.00)
ForHire Consultation (Non-Program Related)	\$	(50,000.00)	\$	(50,000.00)	\$	(50,000.00)				
Friends Group - Staffing Costs			\$	(25,000.00)	\$	(50,000.00)	\$	(75,000.00)	\$	(100,000.00)
Friends Group - Operational Costs (Supplies, Services Etc.)			\$	(3,000.00)	\$	(3,000.00)	\$	(5,000.00)	\$	(5,000.00)
Total Acquisition & Operating Expenses	\$	(22,997,800.00)	\$	(1,291,800.00)	\$	(1,531,900.00)	\$	(1,508,900.00)	\$	(1,533,900.00)
Net Operating	\$	23,002,200.00	\$	6,870,200.00	\$	1,280,300.00	\$	1,850,800.00	\$	2,364,950.00
Capital Expenses	FY 2026 Year 1	FY 2027 Year 2	FY 2028 Year 3	FY 2029 Year 4	FY2030 Year 5	Average Capital Exp. Yrs. 6-10				
Capital Project Expenses - DCR										
One-Time Preservation/ Maintenance Costs - Building & Structures (Hard & Soft Costs)	\$	(50,000.00)	\$	(400,000.00)	\$	(400,000.00)	\$	(500,000.00)	\$	(700,000.00)
One Time Preservation/ Maintenance - Site & Landscape (Hard/Soft Costs)	\$	(50,000.00)	\$	(150,000.00)	\$	(200,000.00)	\$	(400,000.00)	\$	(550,000.00)
Initial Activation - Entry & Parking Lot	\$	(500,000.00)	\$	-	\$	-	\$	-	\$	-
Initial Activation - Signage	\$	(50,000.00)	\$	-	\$	-	\$	-	\$	-
Initial Activation - Natural Surface Trail	\$	-	\$	(200,000.00)	\$	-	\$	-	\$	-
Initial Activation (Design & Permitting)	\$	(85,000.00)	\$	-	\$	-	\$	-	\$	-
Park Development Master Plan & Implementation (Years 6-10)			\$	-	\$	-	\$	-	\$	-
Capital Project Expenses (Analysis & Planning) - DCR										
Pre-Planning/ Cultural Resource Studies/Master Planning		\$	(450,000.00)	\$	(400,000.00)	\$	(325,000.00)	\$	(250,000.00)	
Programmatic Expenses - DCR/Friends (CSO)										
Program Costs				\$	(20,000.00)	\$	(50,000.00)	\$	(70,000.00)	
Event Costs				\$	(30,000.00)	\$	(40,000.00)	\$	(50,000.00)	
Total Capital Expenses	\$	(735,000.00)	\$	(1,200,000.00)	\$	(1,050,000.00)	\$	(1,315,000.00)	\$	(1,620,000.00)
Net Total	\$	22,267,200.00	\$	5,670,200.00	\$	230,300.00	\$	535,800.00	\$	744,950.00
Subtotal End Of Year Available Funds (Net Total + Cash Reserves & Endowment Funds)	\$	22,267,200.00	\$	27,937,400.00	\$	28,167,700.00	\$	28,703,500.00	\$	29,448,450.00
Total End Of Year Available Funds (Subtotal Available Funds + Interest Earnings (3.5%))	\$	22,267,200.00	\$	28,716,750.00	\$	29,172,775.00	\$	29,724,550.00	\$	30,488,800.00
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# Oak Hill - Estimated Site and Landscape Preservation Costs

Updated - January 1, 2025

LCA1 DOMESTIC LANDSCAPE CHARACTER AREA - SITE & LANDSCAPE FEATURE PRESERVATION									
Landscape Character Area	Feature Type	Landscape Feature Name	Condition	Period (Cursory)	Feature Notes	Preservation Recommendations	Cost Description	Cost	
Domestic LCA	Spatial Character	Manor House Setting, North/South Alignment	Good	Monroe	Manor-Like open Spatial Character, Enclosed by Boxwood Hedge, with Shade Trees, Large Shrubs	Maintain - See Vegetation Preservation	No work	\$ -	
	Views/Vistas	Manor House North/South Axial Views & Vistas	Good	Monroe	North-South Axial Views from Manor House to surrounding pastoral landscape	Arboricultural Care - Maintain Views	No work	\$ -	
	Topography	Manor House - Hilltop Location	Good	Monroe		Limit Disturbance; Advanced Archaeological Investigation Required	No work.	\$ -	
	"	"	Sunken Formal Garden	Good	post-Monroe to ca.1940	1920s Littleton Era Landscape	Contractual, Staff Maintenance Strategy (1.5 FTEs)	List - Request of Owner Donated Services	\$ -
	"	Vegetation	Entry Road Shade Tree Allee	Good	Monroe/ post-Monroe to ca.1940	1920s Littleton Era Landscape	Arboricultural Care	List - Request of Owner Donated Services	\$ -
	"	"	Large Park-Like Composition Of Overstory Trees	Good	Monroe/ post-Monroe to ca.1940	1920s Littleton Era Landscape	Arboricultural Care	List - Request of Owner Donated Services	\$ -
	"	"	Perimeter Boxwood Hedge	Good	post-Monroe to ca.1940	1920s Littleton Era Landscape	Specialized Arboricultural Care	List - Request of Owner Donated Services	\$ -
	"	"	Large Trees Near Buildings	Fair	post-Monroe to ca.1940	Monroe through 1920s Littleton Era Landscape	Arboricultural Care	Removal/Structural Preservation (LS)	\$ 50,000
	"	"	Medium to Small Flowering Trees	Good	post-Monroe to ca.1940		Arboricultural Care	List - Request of Owner Donated Services	\$ -
	"	"	1.6 ac. Formal Garden - Small Trees, Shrubs, Borders	Good	post-Monroe to ca.1940	1920s Littleton Era Landscape	Arboricultural, Horticultural Care	Contractual Hire (2 yrs) Until Staffed	\$ 100,000
	"	Hydrology/Water Features	Small 1950s Residential Swimming Pool	Good	ca. 1940-present		Enclosure Required Once Area is Opened To Public/ or Removal Pending Study	No work	\$ -
	"	Circulation	Vehicular - System of Gravel Roads	Good	post-Monroe to ca.1940		Redress/Resurface Compact to 3"	@ \$95/lf +/- 1,625 lf	\$ 154,375
	"	"	Vehicular - Interior Pebble Drives/Parking Areas	Good	ca. 1940-present		Redress/Resurface Compact to 3"	@ \$125/lf +/-995 lf (Hold await master plan)	\$ -
	"	"	Pedestrian - Stone Patio & Walkways	Good	post-Monroe to ca.1940		Repair /Reset Heaved Patio Stones	@ \$30/sf. +/-700sf	\$ 21,000
	"	"	Pedestrian - Concrete Walkways	Fair	ca. 1940-present		Repair / Replace Concrete Walk at West Entry	(LS)	\$ 8,000
	"	"	Pedestrian - Stone Stairs/ Steps	Good	post-Monroe to ca.1940		Repair/Reset Heaved Stones	@ \$30/sf. +/-500sf	\$ 15,000
	"	Site Structures/Walls	Stone Walls - Front Entrance Drive & Brick Gutter	Good	post-Monroe to ca.1940			No work.	\$ -
	"	"	Stone Walls - Formal Garden	Good	post-Monroe to ca.1940			No work	\$ -
	"	"	Stone Walls - Retaining Walls Misc.	Good	post-Monroe to ca.1940			No work.	\$ -
	"	Small Scale Features, Objects	Garden Urns, Statuary, Etc.	Good	post-Monroe to ca.1940			No work	\$ -
	"	"	Paving Stones with Dinosaur Tracks	Good	Pre-Contact	Paving stones with dinosaur tracts placed around Manor House patio	Inventory, Research, Conservation Plan recommended	No work	\$ -
	"	Archaeological Sites	Builder's Trenches for Monroe Era Structures	Good	Monroe	Historically disturbed soils associated with Monroe Era Structures		No work	\$ -
	"	"	Mrs. Monroe's Vault	Precise Location Unidentified	Monroe	NR/NHL Loc. #19. (Circa 1850) Likely Disturbed during formal garden's creation		No work	\$ -
	"	"	Footprint of Early Monroe Occupancy Structures	Precise Location Unidentified	Monroe	Location of historically referenced but non-extant Monroe-Era structures		No work	\$ -
	"	"	Unknown Site/Structure Near Rt. 15 Entrance	Precise Location Unidentified	post-Monroe to ca.1940	NR/NHL Loc. #12. (Missing Bldg Footprint from 1818 plat)		No work	\$ -
	"	"	Maria H. Monroe Gouverneur's Grave	Precise Location Unidentified	post-Monroe to ca.1940	NR/NHL Loc. #10. (Circa 1850) Likely Disturbed during formal garden's creation		No work	\$ -
	"	Utilities - Stormwater	System of yard and site drains, basins, and pipes	Extent Unknown	post-Monroe to present		Investigate/Scope systems to identify functionality/failure	Investigate/Record Conditions - Contractual	\$ 25,000
	"	"	Brick culvert and grates and drains at circular drive	Fair	post-Monroe to ca.1940	Brick culvert and drains	Investigate, Scope, Repair	Investigate/Record/ Design/ Repair - Contractual 120lf	\$ 45,000
	"	Utilities - Electric (Overhead)	Overhead Electric, fed via wood poles	Presumed Good	ca. 1940-present		Inventory for future repair improvements	Investigate/Record Conditions - Contractual	\$ 3,000
	"	Utilities - Buried Natural Gas Lines	Systems of buried Natural Gas lines	Presumed Good	ca. 1940-present		Inventory for future repair improvements	Investigate/Record Conditions - Contractual	\$ 3,000
	"	Utilities - Water/Septic	Systems of Wells, and Drainfields	Presumed Good	ca. 1940-present		Investigate/Scope systems to identify functionality/failure	Investigate/Record Conditions - Contractual	\$ 25,000
Domestic	New Site Security - Gates	Key-Card Electronic Gates	N/A	N/A	Gated Access for Staff, Residents, Tenants (2) at Route 15 Entrance and Workyard Transition	Install Two (2) Key Card Gates ( Run Electricity)	(LS) x2	\$ 40,000	
"	New Regulatory Signs	Regulatory Signs	N/A	N/A	Regulatory Signs at entrances to Domestic Landscape	Install signs	(LS) x2	\$ 15,000	
"	New Interpretive Signs	Interpretive Signs	N/A	N/A	Interpretive Signs (Interim interpretation of Manor House, Cottage, Ancillary Buildings, Gardens)	Design, Install Signs	@ \$3,000 ea. plus design	\$ 35,000	
			N/A						
							SUBTOTAL	\$ 539,375	
* Note: Items in red represent new features supporting limited early activation of site							DESIGN COSTS & GENERAL REQUIREMENTS	18%	\$ 97,088
							OVERHEAD/PROFIT	11%	\$ 59,331
							CONTINGENCY	20%	\$ 107,875
							SUBTOTAL DOMESTIC AREAS SITE & LANDSCAPE PRESERVATION	\$ 803,668.75	

LCA2 WORK YARD LANDSCAPE CHARACTER AREA - SITE & LANDSCAPE FEATURE PRESERVATION									
Landscape Character Area	Feature Type	Landscape Feature Name	Condition	Period (Cursory)	Feature Notes	Preservation Recommendations	Cost Description	Cost	
Work Yards LCA	Spatial Character	Work Yards	Good	Monroe to ca.1940	Cluster Arrangement of agricultural buildings, associated work yards, and tenant housing	Maintain - See Vegetation Preservation	No work	\$ -	
	Views/Vistas	West-facing Views	Good	Monroe -to Present	Long-distance views of Bull Run Mountains and adjacent agricultural lands	Maintain Views	No work	\$ -	
	Topography	Westward sloping topography from Hilltop to Little River	Good	post-Monroe to ca.1940	Gently-sloping to moderate-sloping topography from hilltop to the Little River basin	Limit Disturbance; Advanced archaeological investigation required	No work	\$ -	
	Vegetation	Volunteer and Naturally Occurring Vegetation	Good	ca. 1940-present	Volunteer vegetation along fence lines, building foundations, and in unused work yards	Arboricultural Care / Remove potentially destructive vegetation	Arboricultural Care, Remove Hazzard Trees (LS)	\$ 15,000	
		Invasive Vegetation	Poor	ca. 1940-present	Invasive Vines & Groundcover on Foundations	Remove invasives	Removal (LS)	\$ 3,000	
	Hydrology/Water Features	N/A					No work	\$ -	
		Circulation	Vehicular - System of Gravel Roads	Fair	post-Monroe to ca.1940		Redress/Resurface Compact to 3"	@ \$95/lf +/- 3,000 lf	\$ 285,000
			Vehicular - Interior Gravel Parking Areas	Fair	ca. 1940-present		Redress/Resurface Compact to 3"	@ \$6/sf +/- 6700 sf	\$ 40,000
	Site Structures/Walls	Stone Walls - Retaining Walls Misc.	Good	post-Monroe to ca.1940	Retaining Walls at Main Barn, and other structures		No work	\$ -	
			Network of Fences	Fair	post-Monroe to ca.1940	Network of Wooden Post & 3-Board and 4-Board Fences	Repair and Re-Stain/ Re-Paint Fences	List - Request of Owner Donated Services/ Additional work required	\$ 25,000
		Small Scale Features, Objects	N/A				No work	\$ -	
	Archaeological Sites	Possible Traces of Non-Extant 19th Century Buildings	Precise Location Unidentified	Monroe /post-Monroe to ca.1940	Non-extant structures, most notably location of enslaved workforce cabins, earlier blacksmith shop, "migrant hotel," et. al.	Limit Disturbance; Advanced Archaeological Investigation Required	No work	\$ -	
			Possible Traces of pre-Contact sites	Precise Location Unidentified	Pre-Contact		Limit Disturbance; Advanced Archaeological Investigation Required	No work	\$ -
		Utilities - Stormwater	Overland Swales/Culverts	Good	post-Monroe to Present	Inventory for future repair improvements	No work	\$ -	
		Utilities - Electric (Overhead)	Overhead Electric, fed via wood poles	Presumed Good	post-Monroe to Present	Inventory for future repair improvements	No work	\$ -	
		Utilities - Buried Natural Gas Lines	N/A			Inventory for future repair improvements	No work	\$ -	
		Utilities - Water/Septic	Systems of Wells, and Drainfields	Presumed Good	post-Monroe to Present	Inventory for future repair improvements	No work	\$ -	
Work Yards	New Site Security - Gates	Key-Card Electronic Gates	N/A	N/A	Gated Access for Staff, Residents, Tenants (2) at Route 15 Entrance and Workyard Transition	Install Two (2) Key Card Gates ( Run Electricity)	(LS) x1	\$ 20,000	
	New Regulatory Signs	Regulatory Signs (Entrances)	N/A	N/A	Regulatory Signs at entrances to Work Yard Landscape	Install signs	(LS) x2	\$ 15,000	
	New Regulatory Signs	Regulatory Signs / Building Not Accessible To the Public	N/A	N/A	Regulatory Signs / Building Not Open To the Public	Install signs	(LS) x30	\$ 9,000	
	New Interpretive Signs	Interpretive Signs	N/A	N/A	Interpretive Signs (Interim interpretation of cluster of 19th/20th century agricultural complex of barns and work yards/ Interpretation of Non-Extant Enslaved and Workforce Housing)	Design Install Signs	@ \$3,000 ea. plus design	\$ 9,000	
							SUBTOTAL	\$ 417,000	
* Note: Items in red represent new features supporting limited early activation of site						DESIGN COSTS & GENERAL REQUIREMENTS	18%	\$ 75,060	
						OVERHEAD/PROFIT	11%	\$ 45,870	
						CONTINGENCY	20%	\$ 83,400	
							SUBTOTAL WORK YARD AREAS SITE & LANDSCAPE PRESERVATION	\$ 621,330.00	

Oak Hill - Estimated Site and Landscape Preservation Costs - Page 2

Updated - January 1, 2025

LCA 3-5									
NATURAL & AGRICULTURAL LANDSCAPE CHARACTER AREAS - SITE & LANDSCAPE FEATURE PRESERVATION									
Landscape Character Area	Feature Type	Landscape Feature Name	Condition	Period (Cursory)	Feature Notes	Preservation Recommendations	Cost Description	Cost	
Natural & Agricultural LCA	Spatial Character	Open Agricultural Fields & Woodlots	Good	Monroe Era - to Present	Cluster Arrangement of agricultural buildings, associated work yards, and tenant housing	Maintain - See Vegetation Preservation	No work	\$ -	
		Little River Riparian Corridor	Good/Fair	Pre-Contact - Present			Wetland Mitigation contributed by TCF (No Work)	\$ -	
	Views/Vistas	Interior and Surrounding	Good	Monroe Era - to Present	Long-distance views of Bull Run Mountains and adjacent agricultural lands	Maintain Views	No work	\$ -	
		Vistas from fields toward the hilltop Manor House	Good	Monroe Era - to Present			No work	\$ -	
	Topography	Undulating topography influenced by site hydrology	Good	post-Monroe to ca.1940	Gently-sloping to moderate-sloping topography from hilltop to the Little River basin	Limit Disturbance; Advanced archaeological investigation required	No work	\$ -	
	Vegetation	Agricultural Fields	Good	post-Monroe to ca.1940	Volunteer vegetation along fence lines, building foundations, and in unused work yards	Continue Farm Leasing/ Establish Best Practices	No work	\$ 15,000	
		Volunteer, Naturally Occurring, Planted Vegetation	Good			Arboricultural Care / Remove potentially destructive vegetation	No work	\$ -	
		Invasive Vegetation	Poor	post-Monroe to ca.1940	Invasive Vines & Groundcover on Foundations	Remove invasives/Work to be conducted under future staffed, routine maintenance	No work	\$ 3,000	
	Hydrology/Water Features	Little River Riparian Corridor	Good	post-Monroe to ca.1940			No work	\$ -	
		Tributaries of Little River	Good	Pre-Contact - Present			No work	\$ -	
		System of Farm Dikes	Good	Pre-Contact - Present			No work	\$ -	
		Tail Race (Extending from Aldie Mill)	Good	Monroe Era			No work	\$ -	
	Circulation	Vehicular - Gravel Road - Oak Hill Farm Road	Fair	post-Monroe to ca.1940		Redress/Resurface Compact to 3" - Early Phase Renewal	@ \$95/lf +/- 1,470 lf	\$ 139,590	
	Circulation	Vehicular - Gravel Road - Oak Hill Farm Road	Fair	post-Monroe to ca.1940		Redress/Resurface Compact to 3" - Later Phase	@ \$95/lf +/- 2,530 lf	\$ 380,000	
		Vehicular - Gravel Road to South Farm	Fair	post-Monroe to ca.1940		Redress/Resurface Compact to 3"	@ \$70/sf +/- 2,075 sf	\$ 145,250	
		Vehicular - Gravel Road to North Farm	Fair	post-Monroe to ca.1940		Redress/Resurface Compact to 3"	@ \$70/sf +/- 1,050 sf	\$ 73,500	
	Site Structures/Walls	Network of Fences	Good	post-Monroe to ca.1940	Network of Wooden Post & 3-Board and 4-Board Fences	Repair and Re-Stain/ Re-Paint Fences (Future Work - Post Master Plan)	No work	\$ -	
		Network of Fences	Fair/Poor	post-Monroe to ca.1940	Network of High Tensil Wire and Barbed Wire	Remove Barbed Wire Fencing Harmful to Visitors/Wildlife (Future Grant Opps)	Limit to areas adjacent to interim trails (LS)	\$ 15,000	
	Small Scale Features, Objects	N/A	Good	post-Monroe to ca.1940			No work	\$ -	
	Archaeological Sites	Possible Traces of Non-Extant 19th Century Buildings	Precise Location Unidentified	Monroe /post-Monroe to ca.1940	Non-extant structures, most notably including Quarry site, Mill site, Garrett House site (Southeast corner) Samuel L. Gouveneur home site (near north farm),	Limit Disturbance; Advanced Archaeological Investigation Required	No work	\$ -	
		Possible Traces of pre-Contact sites	Precise Location Unidentified	Pre-Contact	Early Archaic, Woodland, Pre-Columbian, other Pre-Contact Sites	Limit Disturbance; Advanced Archaeological Investigation Required	No work	\$ -	
		Traces of Manassas Gap Railroad	Good	post-Monroe to ca.1940	Traces of Manassas Gap Railroad (Northeast Corner of Property)		No work	\$ -	
		Sites Associated with Civil War Encampments & Battle of Aldie, Middleburg, Upperville	Good	post-Monroe to ca.1940	Sites Associated with Civil War Encampments & Battle of Aldie, Middleburg, Upperville		No work	\$ -	
		Vegetated Islands within agricultural fields	Good	post-Monroe to ca.1940	Vegetated Islands within agricultural fields (South, West, and North Fields)		No work	\$ -	
		Linear accumulations of stone/ salvaged along fencerows	Good	post-Monroe to ca.1940	Linear accumulations of stone/ salvaged along fencerows		No work	\$ -	
	Utilities - Stormwater	Overland Swales/Culverts/Farm Dikes	Good	post-Monroe to Present		Inventory for future repair improvements	No work	\$ -	
	Utilities - Electric (Overhead)	Overhead Electric, fed via wood poles	Presumed Good	post-Monroe to Present		Inventory for future repair improvements	No work	\$ -	
	Utilities - Buried Natural Gas Lines	Buried Natural Gas Lines	Presumed Good	post-Monroe to Present		Inventory for future repair improvements	No work	\$ -	
	Utilities - Water/Septic	Systems of Wells, and Drainfields	Presumed Good	post-Monroe to Present		Inventory for future repair improvements	No work	\$ -	
Natural & Agricultural LCA	New Site Security - Gates	Key-Card Electronic Gates	N/A	N/A	Gated Access for Staff, Residents, Tenants (3) at Oak Hill Farm Road, South Farm, North Farm	Install Three (3) Key Card Gates (Run Electricity)	(LS) x3	\$ 30,000	
	New Entry & Parking Lot	New Parking Area (Location TBD)	N/A	N/A	New Gravel Parking Area - 30 Spaces including 4 HC (Location TBD)	Install new Gravel Parking Area - 30 Spaces including 4 HC (Location TBD)	@ 8,000 /space +/- 40 spaces	\$ 320,000	
	New - Natural Surface Trail	New Pedestrian Trail (Location TBD)	N/A	N/A	2 Mile - Natural Surface Pedestrian Trail (Location TBD)	Install natural surface trail	@ \$20,000.00/MI. +/- 2 Mile	\$ 40,000	
	New - ADA portion of Trail	New Pedestrian Trail (Location TBD)	N/A	N/A	1 Mile - Accessible Trail Route - Trailhead to Natural Surface Trail (Location TBD)	Install paved asphalt trail (8' width)	@ \$395,000.00/MI. +/- 1/2 Mile	\$ 197,500	
	New Pedestrian Benches/Dog Waste Rec. Stations	New Benches & Dog Waste Receptacles along trail (Location TBD)	N/A	N/A	Install DCR - Approved Benches and Dog Waste Receptacles	Install DCR - Approved Benches and Dog Waste Receptacles	(LS)	\$ 30,000	
	New Regulatory Signs	Regulatory Signs (Entrances)	N/A	N/A	Regulatory Signs (4) at entrances at Oak Hill Farm Road, South Farm, North Farm, and at New Parking Area	Install signs	(LS) x4	\$ 30,000	
	New Interpretive Signs	Interpretive Signs	N/A	N/A	Interpretive Signs (Interim interpretation of Oak Hill Overarching Site Significance, Context, Future Planning) (4)	Design Install Signs	@ \$3,000 ea. plus design	\$ 12,000	
							SUBTOTAL	\$ 1,430,840	
* Note: Items in red represent new features supporting limited early activation of site							DESIGN COSTS & GENERAL REQUIREMENTS	18%	\$ 257,551
							OVERHEAD/PROFIT	11%	\$ 157,392
							CONTINGENCY	20%	\$ 286,168
							SUBTOTAL NATURAL AND AGRICULTURAL AREAS SITE & LANDSCAPE PRESERVATION		\$

Key	Definition/ Description
	Features listed in green are generally in good structural and physical shape requiring minimal investment
	Features listed in orange require attention to stabilize and or improvements required for early activation
Red Text Entries	Items in red represent new features supporting limited early activation of site

Calculations represented herein are credited to STACH pllc preservation landscape architects and planners, professionals working exclusively with the preservation of historic landscapes. Costs identified reflect on-site observations made in September-November 2024, and reflect current trade/unit costs.

LANDSCAPE PRESERVATION & LIMITED SITE ACTIVATION COSTS - YEARS 1-5 ALL AREAS		
Aggregate Base Costs	\$	1,419,465
Aggregate Design & General Requirements Costs	\$	255,504
Aggregate OverHead/Profit Costs	\$	156,141
Aggregate Contingency	\$	283,893
SubTotal Projected Budget Landscape Preservation & Limited Activation Years 1-5 Investment	\$	2,115,002.85

TOTAL LANDSCAPE PRESERVATION COSTS ALL AREAS - YEARS 1-10 (Combined)		
Aggregate Base Costs	\$	2,387,215
Aggregate Design & General Requirements Costs	\$	429,699
Aggregate OverHead/Profit Costs	\$	262,594
Aggregate Contingency	\$	477,443
Total Projected Budget Landscape Preservation & Limited Activation 10 Year Investment	\$	3,556,950.35



Oak Hill - Building Inventory and Estimated Building Preservation Costs									
Updated: January 1, 2025									
LCA1 DOMESTIC LANDSCAPE CHARACTER AREA - BUILDINGS & STRUCTURES PRESERVATION									
NHL #	Building Name (per NHL)	Condition	Period	Notes	Type	Rough Dimensions	Landscape Zone	Cost Description	Cost
1 (Priority)	Manor House	Standing/Good	Monroe		Main House	See plans	Domestic Landscape	Envelope Repairs; replace flat roofing	\$ 210,000
2 (Priority)	The Cottage	Standing/Good	Monroe	aka "Judge Jones Hs", "Yellow Hs."	Large Tenant Hs.	Assume 50x30; 2.5 stories.	Domestic Landscape	Envelope Repairs	\$ 140,000
3 (Priority)	Smokehouse	Standing/Good	Monroe	Two-story masonry building built on hill.	Small Masonry Struc	21x16	Domestic Landscape	Envelope Repairs	\$ 325,000
4 (Priority)	Springhouse	Standing/Good	Monroe	Shingle building with tower.	Wood Frm Tower	27x17	Domestic Landscape	Envelope Repairs	\$ 160,000
6 (Priority)	The Stallion Barn	Ruin/Partial Collapse	Monroe	Ruin - stone walls remain.	Masonry Ruin		Domestic Landscape	Stabilize; Provide protective structure	\$ 110,000
18 (Priority)	Tenant House	Standing/Good	post-Monroe to ca.1940	House west of the cottage.	Large Tenant Hs.	39x33 (main portion) 7x14 (extension)	Domestic Landscape	Envelope Repairs	\$ 60,000
19	Greenhouse	Standing/Good	post-Monroe to ca.1940	Greenhouse east of NHL 18. Modern.	Glass/Metal on Conc.	Approx 12x16	Domestic Landscape	No work.	\$ -
							SUBTOTAL HARD COSTS		\$ 1,005,000
							GENERAL REQUIREMENTS	18%	\$ 180,900
							OVERHEAD/PROFIT	11%	\$ 110,550
							CONTINGENCY	20%	\$ 201,000
							SUBTOTAL RANGE DOMESTIC LCA BUIDINGS & STRUCTURES Preservation		\$1,500,000 - \$2,000,000

Key

Definition/ Description

Standing/Good	Structures is good physical and operable condition requiring minimal investment
Ruin/Partial Collapse	Structures in decline requiring significant investment
No Longer Extant/Not Found	Structures no longer extant, based on 2024 Field Observations

Stabilization	Investments made to ensure or improve a structure's stability or structural integrity and may including foundation repairs or repair, reinforcement, or replacement of structural members.
Envelope Repairs	Represents repairs made to a building's exterior (Roof, gutter, downspouts, siding, etc.) to keep the building dry and limit water infiltration. By example:Repairs to a roof means replacing missing shingles if damaged by a weather event, or replacing all shingles if the roof is past its service life; Repairs to siding means patching damaged wood boards so they can shed water, and repainting where paint is damaged and cannot keep boards dry; Repairs to doors and windows mean replacing broken glass and repairing/repainting wood portions.
No Work	Assigned to structures whose physical condition does not require initial investment and/or is not prioritized for public activation/access or use

Calculations represented herein are credited to STACH pllc preservation landscape architects and planners, and JKOA historical architects, professionals working exclusively with the preservation of historic sites, buildings, and landscapes. Costs for building preservation were conducted on-site, and reviewed with preservation contractors/builders November/December 2024.

Oak Hill - Building Inventory and Estimated Building Preservation Costs - Page 2

LCA2 WORK YARD LANDSCAPE CHARACTER AREA - BUILDINGS & STRUCTURES PRESERVATION									
NHL #	Building Name (per NHL)	Condition	Period	Notes	Type	Rough Dimensions	Landscape Zone	Cost Description	Cost
5 (Priority)	Blacksmith Shop	Standing/Fair	Monroe	Small gable-roofed building.	Small Frame Structure	21x14	Workyard Landscape	Stabilize struc system; envelope repairs	\$ 85,000
7 (Priority)	Barn	Standing/Fair	Monroe	East portion nearest house is earliest, NHL attributes to Monroe period. Lots of salvaged material in this area based on inspection. Linear portion to west and small gable extension to south are later.	Large Frame Structure	40x48 (E. end),16x37 (W. end) 30x80 (Center)	Workyard Landscape	Structural repairs including work to sills and foundation walls; Exterior envelope.	\$ 550,000
20	Storage Building	Standing/Fair	post-Monroe to ca.1940	Gable-roofed building near NHL 21.	Small Frame Structure	13x25	Workyard Landscape	Structural/foundation repairs; Envelope repairs	\$ 155,000
21 (Priority)	Tenant House	Standing/Good	post-Monroe to ca.1940	Tenant house with basement. "Harold's House". Similar to NHL 42, 43, 49.	Small Tenant Hs.	21x31 (main portion) 7x31 (shed extension)	Workyard Landscape	Envelope repairs	\$ 60,000
22	Shed	Standing/Fair	post-Monroe to ca.1940	Small shed north of NHL 21	Small Frame Structure	Approx 12x12	Workyard Landscape	Extensive Structural repairs; Envelope repairs	\$ 45,000
23 (Priority)	Pumphouse	Standing/Good	post-Monroe to ca.1940	Former shed structure converted to tenant house in recent years. One room contains well pump equipment. House is the nearest to NHL 7 and NHL 24	Small Tenant Hs.	31x31	Workyard Landscape	Envelope repairs	\$ 30,000
24	Corn Crib	Standing/Fair	post-Monroe to ca.1940	Gable-roofed structure with vertical slat exterior.	Small Frame Structure	26x21	Workyard Landscape	Structural/Foundation repairs; Envelope repairs	\$ 65,000
25 (Priority)	Main Barn	Standing/Fair	post-Monroe to ca.1940	Large gable-roofed barn with two silos at east end (one a ruin). Three full levels and a mezzanine.	Large Frame Structure	154x45 (1) 18ft Dia Conc Silo	Workyard Landscape	Structural Repairs; Envelope repairs	\$ 525,000
26 (Priority)	Dairy Barn	Standing/Fair	post-Monroe to ca.1940	Linear barn set perpendicular and south of main barn. Connected by bridge.	Large Frame Structure	111x35	Workyard Landscape	Structural Repairs; Envelope repairs	\$ 140,000
27	Small Barn	Standing/Fair	post-Monroe to ca.1940	Linear barn north of NHL 25. Entered primarily from east; many doorways on south elevation.	Small Frame Structure	81x17	Workyard Landscape	Structural Repairs; Envelope repairs	\$ 135,000
28	Shed	Ruin/Partial Collapse	post-Monroe to ca.1940	Simple linear shed sloping to north. Heavily overgrown. Roof appears to have partially collapsed. Location shown on sketch map is slightly off.	Small Frame Structure		Workyard Landscape	No work. Suggest recordation and removal for safety.	\$ -
29	Shed	Ruin/Partial Collapse	post-Monroe to ca.1940	Simple linear shed sloping to north. Heavily overgrown. Roof appears to have partially collapsed. Location shown on sketch map is slightly off.	Small Frame Structure		Workyard Landscape	No work. Suggest recordation and removal for safety.	\$ -
30	Scale Building	Standing/Fair	post-Monroe to ca.1940	West of main barn.	Small Frame Structure	17x23	Workyard Landscape	Structural Repairs; Envelope repairs	\$ 110,000
31	Equipment Shed	Standing/Fair	post-Monroe to ca.1940	Shed with large doors on both sides. Currently contains vehicles.	Small Frame Structure	46x31	Workyard Landscape	Structural Preservation, Repairs; Envelope repairs	\$ 225,000
32	Shed	Standing/Fair	post-Monroe to ca.1940	South of scale building. Open to south.	Small Frame Structure	61x26	Workyard Landscape	Structural Repairs; Envelope repairs	\$ 95,000
33	Barn	Standing/Fair	post-Monroe to ca.1940	Small barn south of NHL 32.	Small Frame Structure	54x31	Workyard Landscape	Structural Repairs; Envelope repairs	\$ 225,000
34	Office	Standing/Fair	post-Monroe to ca.1940	Masonry building containing "library."	Small Masonry Struc	21x16	Workyard Landscape	Envelope repairs	\$ 25,000
36 (Priority)	Tenant House	Standing/Good	post-Monroe to ca.1940	Long tenant house with open porch along north side. Full basement. Former unmarried farm worker housing per NHL. Located south of dairy barn NHL 26.	Large Tenant Hs.	67x21 (main portion) 9x50 (open porch)	Workyard Landscape	Envelope repairs	\$ 35,000
37	Shed	No Longer Extant/Not Found	post-Monroe to ca.1940	Shown south of machine shop (NHL 38). Appears to no longer exist.	N/A		Workyard Landscape	No work.	\$ -
38 (Priority)	Machine Shop	Standing/Fair-Poor	post-Monroe to ca.1940	Unique three-level structure with enclosed windmill base at west end.	Large Frame Structure	60x17 (Main portion) 19x14 (Shed addition)	Workyard Landscape	Extensive structural Preservation and repair; Secure well; Envelope Repairs	\$ 425,000
39	Shed	No Longer Extant/Not Found	post-Monroe to ca.1940	Shown north of machine shop. Appears in NHL photo. No longer extant.	N/A		Workyard Landscape	No work.	\$ -
40	Barn	Standing/Fair	post-Monroe to ca.1940	Gable roof structure open on south side. Exterior is a mixture of vertical slats and metal. North portion is separated and appears to have been a corn crib.	Large Frame Structure	55x28	Workyard Landscape	Structural Repairs; Envelope repairs	\$ 160,000
41	Wagon Shed	Standing/Fair	post-Monroe to ca.1940	Shed-roofed stucture with large door opening. South of NHL 42.	Small Frame Structure	Approx 10x20	Workyard Landscape	Envelope repairs	\$ 30,000
42 (Priority)	Tenant House	Standing/Good	post-Monroe to ca.1940	Tenant house similar to NHL 21, 43, 49. No basement.	Small Tenant Hs.	21x31 (main portion) 6x10 (shed extension)	Workyard Landscape	Envelope repairs	\$ 30,000
43 (Priority)	Tenant House	Standing/Good	post-Monroe to ca.1940	Tenant house similar to NHL 21, 42, 49. No basement.	Small Tenant Hs.	21x31 (main portion) 7x13 (shed extension)	Workyard Landscape	Envelope repairs	\$ 30,000
44	Shed	Standing/Fair	post-Monroe to ca.1940	Shed immediately north of NHL 43.	Small Frame Structure	Approx 10x20	Workyard Landscape	Envelope repairs	\$ 30,000
45	Outhouse	Ruin/Partial Collapse	post-Monroe to ca.1940	Shown northwest of NHL 43. A structure thought to be an outhouse is adjacent to NHL 48, which is not identified by the map. It's possible that the map has the wrong location for this structure. The potential outhouse is partially collapsed.	Small Frame Structure	Approx 6x8	Workyard Landscape	No work. Suggest recordation and removal for safety.	\$ -
46	Shed	Standing/Fair	post-Monroe to ca.1940	Small shed north of NHL 43.	Small Frame Structure	Approx 12x10	Workyard Landscape	Extensive Structural repairs; Envelope repairs	\$ 12,500
47	Shed	Standing/Fair	post-Monroe to ca.1940	Small shed north of NHL 43. Likely originally associated with NHL 49.	Small Frame Structure	Approx 12x10	Workyard Landscape	Extensive Structural repairs; Envelope repairs	\$ 38,000
48	Wagon Shed	Standing/Fair	post-Monroe to ca.1940	Small shed north of NHL 43. Likely originally associated with NHL 49.	Small Frame Structure	Approx 12x10	Workyard Landscape	Extensive Structural repairs; Envelope repairs	\$ 38,000
49 (Priority)	Tenant House	Ruin/Partial Collapse	post-Monroe to ca.1940	Burned tenant house similar to NHL 21, 42, and 43. Had already burned at the time of the NHL nomination.	Small Tenant Hs.		Workyard Landscape	Stabilize; Provide protective structure	\$ 85,000
50 (Priority)	Manager's House	Standing/Good	post-Monroe to ca.1940	2-story shingle-clad house.	Large Tenant Hs.	45x36 (main portion);two stories 30x8 (open porch)	Workyard Landscape	Envelope repairs	\$ 35,000
51	Barn	Standing/Fair-Poor	post-Monroe to ca.1940	Medium-sized gable-roofed barn near NHL 52.	Large Frame Structure	44x34	Workyard Landscape	Stabilize structure; Envelope repairs	\$ 450,000
52 (Priority)	Tenant House	Standing/Good	post-Monroe to ca.1940	L-shaped tenant house.	Small Tenant Hs.	L-shape;two stories 19x26 (main leg),13x13 (L leg) 13x6, 19x7 (2 open porches)	Workyard Landscape	Envelope repairs	\$ 65,000
53	Storage Shed	Ruin/Partial Collapse	post-Monroe to ca.1940	No structure extant at location shown on map; however, a similarly sized shed a short distance west not identified by the NHL nomination has collapsed. It's possible the map location is incorrect.	Small Frame Structure		Workyard Landscape	No work. Suggest recordation and removal for safety.	\$ -
54	Shed	No Longer Extant/Not Found	post-Monroe to ca.1940	No above-grade evidence remains.	N/A		Workyard Landscape	No work.	\$ -
55	Shed	Standing/Fair	post-Monroe to ca.1940	Small shed associated with NHL 52.	Small Frame Structure	Approx 10x18	Workyard Landscape	Envelope repairs	\$ 38,000
N/A	Shed	Standing/Fair	post-Monroe to ca.1940	Small shed northeast of NHL 42	Small Frame Structure	Approx 12x10	Workyard Landscape	Envelope repairs	\$ 38,000
							SUBTOTAL HARD COSTS		\$ 4,009,500
							GENERAL REQUIREMENTS	18%	\$ 721,710
							OVERHEAD/PROFIT	11%	\$ 441,045
							CONTINGENCY	20%	\$ 801,900
							SUBTOTAL RANGE WORKYARD LCA BUIDINGS & STRUCTURES Preservation	\$6,000,000 - \$6,500,0000	



Oak Hill - Building Inventory and Estimated Building Preservation Costs - Page 3

LCA 3-5	NATURAL & AGRICULTURAL LANDSCAPE CHARACTER AREAS - BUILDINGS & STRUCTURES PRESERVATION								
NHL #	Building Name (per NHL)	Condition	Period	Notes	Type	Rough Dimensions	Landscape Zone	Cost Description	Cost
8 (Priority)	The Brick House	Ruin/Partial Collapse	Monroe	Ruin at the corner of Rt 15 & Rt 50.	Masonry Ruin		Agricultural Landscape	Stabilize; Provide protective structure	\$135,000
56 (Priority)	Tenant House	Standing/Good	post-Monroe to ca.1940	L-shaped tenant house. (Alfred's House)	Small Tenant Hs.	L-shape;two stories 21x33 (main leg) 8x15 (secondary leg)	Agricultural Landscape	Envelope repairs	\$30,000
57	Shed	Standing/Fair	post-Monroe to ca.1940	Shed associated with NHL 56.	Small Frame Structure	Approx 10x10	Agricultural Landscape	Envelope repairs	\$12,500
58	Silos	Standing/Good	ca. 1940-present	Grouping of four modern metal silos.	Galv. Metal		Agricultural Landscape	No work.	\$-
59	Shed	Ruin/Partial Collapse	ca. 1940-present	Small shed associated with metal silos. Collapsed.	Small Frame Structure		Agricultural Landscape	No work. Suggest recordation and removal for safety.	\$-
60	South Barn	Standing/Fair	post-Monroe to ca.1940	Large barn built on a hill. A shed structure attached to the southeast elevation has largely collapsed. Structure difficult to access due to overgrowth.	Large Frame Structure	100x34 (2) 17 ft Dia Conc Silos	Agricultural Landscape	Stabilize struc system; envelope repairs	\$225,000
61	Shed	Ruin/Partial Collapse	ca. 1940-present	Long shed structure across road from NHL 60; largely collapsed.	Small Frame Structure		Agricultural Landscape	No work. Suggest recordation and removal for safety.	\$-
62	Shed	Ruin/Partial Collapse	ca. 1940-present	Long shed structure across road from NHL 60; largely collapsed.	Small Frame Structure		Agricultural Landscape	No work. Suggest recordation and removal for safety.	\$-
63 (Priority)	Shingle House	Standing/Good	post-Monroe to ca.1940	Two-story tenant house. Recently remodeled. Also known as "south house."	Small Tenant Hs.	Irregular shape, two stories; Approx 25x30 overall	Agricultural Landscape	Envelope repairs	\$10,000
64 (Priority)	North Farm House	Standing/Good	post-Monroe to ca.1940	Square two-story wood framed tenant house.	Large Tenant Hs.	27x27 (main portion, two stories) 8x27 (open porch) 6x10 (side porch) 8x13 (shed addition)	Agricultural Landscape	Envelope repairs	\$60,000
65	North Farm Barn	Standing/Fair	post-Monroe to ca.1940	Gable-roofed barn with two levels. Located just northwest of NHL 64.	Large Frame Structure	45x30	Agricultural Landscape	Structural Repairs; Envelope repairs	\$165,000
66	North Farm Shed and Silo	Standing/Fair	post-Monroe to ca.1940	Shed open on the east elevation. An extension and concrete silo are at the north end. Shed is a mixture of wood and steel frame construction.	Large Frame Structure	100x45 (Main Portion) 13x38 (Extension) (1) 18 ft Dia Conc Silo	Agricultural Landscape	Structural Repairs; Envelope repairs	\$225,000
N/A	Shed	Standing/Fair	post-Monroe to ca.1940	Gable-roofed shed north of shingle house (NHL 63).	Small Frame Structure	Approx 10x14	Agricultural Landscape	Envelope repairs	\$38,000
							SUBTOTAL HARD COSTS		\$900,500
							GENERAL REQUIREMENTS	18%	\$162,090
							OVERHEAD/PROFIT	11%	\$99,055
							CONTINGENCY	20%	\$180,100
							SUBTOTAL RANGE NATURAL & AGRICULTURAL LCA BUIDINGS & STRUCTURES PRESERVATION		\$1,300,000 - \$1,500,000

Key

Standing/Good	Structures is good physical and operable condition requiring minimal investment
Ruin/Partial Collapse	Structures in decline requiring significant investment
No Longer Extant/Not Found	Structures no longer extant, based on 2024 Field Observations

Stabilization	Investments made to ensure or improve a structure's stability or structural integrity and may including foundation repairs or repair, reinforcement, or replacement of structural members.
Envelope Repairs	Represents repairs made to a building's exterior (Roof, gutter, downspouts, siding, etc.) to keep the building dry and limit water infiltration. By example:Repairs to a roof means replacing missing shingles if damaged by a weather event, or replacing all shingles if the roof is past its service life; Repairs to siding means patching damaged wood boards so they can shed water, and repainting where paint is damaged and cannot keep boards dry; Repairs to doors and windows mean replacing broken glass and repairing/repainting wood portions.
No Work	Assigned to structures whose physical condition does not require initial investment and/or is not prioritized for public activation/access or use

Calculations represented herein are credited to STACH pllc preservation landscape architects and planners, and JKOA historical architects, professionals working exclusively with the preservation of historic sites, buildings, and landscapes. Costs for building preservation were conducted on-site, and reviewed with preservation contractors/builders November/December 2024.

PRESERVATION COST FOR IDENTIFIED PRIORITY STRUCTURES YEARS 1-10 - ALL AREAS (Note: Priority Structures Identified Above in Purple Highlight)		
TOTAL HARD COSTS		\$3,335,000
GENERAL REQUIREMENTS	18%	\$600,300
OVERHEAD/PROFIT	11%	\$366,850
CONTINGENCY	20%	\$667,000
TOTAL PRIORITY STRUCTURES - ALL AREAS		\$4,969,150.00

ESTIMATED PRESERVATION COSTS FOR NON-PRIORITY STRUCTURES - ALL AREAS (Note: Structures in this category are recommended for future study prior to cost expenditure. Being largely comprised of ancillary support structures, sheds, and outbuildings, most are not deemed critical to park operations).		
TOTAL HARD COSTS		\$2,580,000
GENERAL REQUIREMENTS	18%	\$464,400
OVERHEAD/PROFIT	11%	\$283,800
CONTINGENCY	20%	\$516,000
TOTAL PRESERVATION COSTS NON-PRIORITY STRUCTURES (PENDING ADVANCED STUDY TO DETERMINE VIABILITY/USE)		\$3,844,200

# APPENDIX B – LANDSCAPE AND ARCHITECTURAL CONDITIONS ASSESSMENT

The following illustrated narrative documents the study team’s observation of existing conditions conducted in the Fall of 2024 and reveals the “remarkably good” condition of the resource as a whole. These observations, reveal Oak Hill’s extant character to comprise 1,240 acres of scenic Virginia Piedmont lands replete with over 2 miles of rivers and tributaries, over 900 acres of agricultural fields, farm woodlots and tree rows, domestic improved areas and formal gardens, and an impressive collection of farmyard/work yard spaces, and accompanying structures. This conditions assessment was carried out across two, multi-day site visits employing a reconnaissance-level of observation, pursuant to the *Secretary of Interior Guidelines for Identification, (National Register Bulletin 24 - Technical Information on Comprehensive Planning, Survey of Cultural Resources, and Registration in the National Register of Historic Places)*, and suitable to determine resource character and predict foreseeable costs.

These observations of landscape and architectural conditions are presented in the illustrated narrative herein and organized by the future park’s extant landscape “character areas.” The narrative below begins with the description of landscape character defining features Part B1, followed by the description of architectural features B2. The inventory of buildings and structures within each character area as identified on the accompanying ***Landscape Character Areas - Building Inventory***, and the ***Historic Core - Building Inventory***. All photos presented in this assessment were taken by the study team. Preliminary assumptions of costs informed by this analysis are presented in Appendix A.



*ArcGIS image showing documented photo capture of Oak Hills landscape and architectural resources. The study team conducted two multi-day surveys of the property in the Fall of 2024, documented key features to assess initial and ongoing costs associated with the development of the property as a future unit of Virginia State Parks. Courtesy STACH pllc.*



# B1. LANDSCAPE FEATURES

The Park/Landscape Character Areas (LCAs) described below reflect the historic and contemporary organization and use of landscape spaces across the Oak Hill property. Each character area is influenced by land uses, conditions, and management practices established over time and in place today. These spaces/areas also reflect their historic past and provide a framework for planning the future park in ways that retain the property's unique "sense of place" and history, while accommodating new and compatible recreative uses for both locals and visitors alike. The Oak Hill landscape is thus divided into five (5) distinct Park/Landscape Character Areas (LCAs) described below.

Following each landscape character area's description and statement of opportunity, is a brief listing and description of the character-defining features (CDFs) of the Oak Hill landscape. These features follow the general classifications of site-based features identified by *The Secretary of the Interior's Standards for the Treatment of Historic Properties with Guidelines for the Treatment of Historic Landscapes (Guidelines)*, and help to articulate landscape character, form, and detail.

- Spatial Character
- Views and Vistas (both internal and perimeter or distant vistas)
- Topography and Terrain
- Vegetation
- Water Features and Hydrology
- Circulation
- Structures (non-habitable; walls, fences, etc.)
- Small Scale Features and Objects (Urns, Signs, etc.)

Together these landscape areas and their associated features help to shape the future park's experience, authentically rooted in the spaces still visible today that reflect Oak Hill's vibrant history and landscape evolution.

## B1.1 Oak Hill Landscape Character Area 1 (LCA1) – Domestic Landscape Character Area

This area encompasses the designed and managed landscape associated with the grounds, gardens and buildings of historic Oak Hill. The buildings and spaces within this character area, as shown on the accompanying plans, include four Monroe-Era buildings (1812-1831), as well as 19<sup>th</sup> century buildings, each supporting the domestic use of this portion of the historic site/park, each intentionally hemmed-in by the encompassing, circa 1920s/30s boxwood hedge.

*Observations/ Opportunities – This park/landscape character area holds potential, with minimal initial investment, to interpret the property's storied historic evolution, most notably James and Elizabeth Monroe's presidential home, and the community of both freed and enslaved inhabitants. Use of the buildings, gardens, and grounds for events, education, and interpretation may well transcend the focus on any one historic period to tell of the property's broad and expansive history. The axial vistas to the north and south from the Manor House are well conserved viewsheds worthy of*

*continued preservation and management, and free from contemporary intrusions. Additional studies should assess the buildings and landscape spaces in detail and inform master planning.*



**Spatial Character:** The dominant feature influencing the spatial character of this area is the circa 1920s perimeter boxwood hedge extending westward from the property's entrance from Route 15. This continuous hedge encloses the entirety of the domestic landscape. *Condition - Good (recently trimmed)*

**Views and Vistas:** Prominent views and vistas include the axial westward view along the property's entrance drive, and both the north and south axial views extending from the Manor House. *Condition – Good*

**Topography and Terrain:** Oak Hill's namesake is nowhere more prevalent than the Manor House's dominant position atop the property's highest knoll at 401' elevation. Other terrain features include the terracing of the formal gardens to the house's immediate south elevation. *Condition – Good*



**Vegetation:** Defining vegetation features include the aforementioned perimeter boxwood hedge; the tree-lined allée along the entry drive; the collection of mature park-like groves of trees throughout this area; and the 1.6-acre sunken garden. *Condition – Overall vegetation is in very good health, evidence of recent pruning, arboriculture, and well managed. The formal gardens are largely comprised of lower maintenance plants, suitable for the space, and representing lower-maintenance species that attractively fill the space. Several large specimen trees are located near historic structures and will require arboricultural care or removal to ensure protection of the adjacent building.*

**Water Features and Hydrology:** A small circa 1950s residential swimming pool, located south of the Judge Jones Cottage is the only water feature. *Condition – Good to fair, however the park will need to secure access via gate or remove the pool depending on future study.*

**Vehicular Circulation:** Vehicular circulation is comprised of gravel drives running east west through the domestic landscape. There is not an abundance of designated parking beyond the immediate entry drives and parking spaces in front of each building. *Condition - Drives are in good condition but may benefit from re-dressing of stone once public access is permitted.*





**Pedestrian Circulation:** Flagstone walks, steps, and footpaths define formal pathways throughout the domestic landscape. Accessible routes will require further study, but improvements would likely be limited to passage from the Manor House to the upper terraces of the formal gardens. Condition – Good. The stone is noticeably slippery when wet, prompting consideration of alternate routes or closure of some areas weather permitting.

**Structures (non-habitable; walls, fences, etc.):** Stones walls, and wooden garden pergolas serve as key spatial-defining features of the circular north entry court drive and define the terracing of the formal gardens. Condition - Walls appear to be

*in sound condition, will require repointing at some point in the future but do not present noticeable structural deficiencies. Pergolas serve as focal points in lower gardens, will require rebuilding at some future date.*

**Small Scale Features and Objects (Urns, Signs, etc.):** Prominent small-scale features within the domestic landscape include commemorative and historical placards, and urns and statuary within the formal gardens. Condition – Good.

**Short Term Activation Improvements:** Modifications anticipated to permit public access for limited early activation of the domestic landscape includes the addition of perimeter access gates, and regulatory signage. Temporary solutions for accommodating universal access may be made at low cost and limited to entrance to the Manor House on its east or west entrances.

## B1.2 Oak Hill Landscape Character Area 2 (LCA2) – Work Yard Landscape Character Area

This park/landscape character area is located immediately west of the domestic landscape and boasts one of the most significant and well-stewarded collections of agricultural buildings anywhere in the commonwealth. Most structures date to the late nineteenth and early twentieth century, and also include two Monroe-Era structures within the collection. The buildings are impressive and include both hulking, massive barns and smaller agricultural sheds and ancillary structures. An abundant number of tenant houses exist in good condition within this landscape area. Westward views abound and provide expansive views to the surrounding landscape. While this area retains excellent coverage of 19<sup>th</sup> and 20<sup>th</sup> century structures and work yards, buried is any trace or footprint of the dwellings of the more than sixty enslaved men and women who inhabited this landscape during the Monroe era.

*Observations/ Opportunities – This park/landscape character area holds unparalleled potential to experience and interpret the evolution of agriculture in the Virginia Piedmont from the early 19<sup>th</sup>*

century to the present. Investment would be required to transition industrial/agricultural buildings to new uses. Study and archaeological analysis of the stories and lost spaces of the enslaved and descendent communities will be helpful to interpreting this and all park character areas. Additional studies assessing the buildings in greater detail will inform master planning.



**Spatial Character:** Lying immediately west of the domestic landscape, this spatial zone comprises a gently westward sloping hillside with an abundance of agricultural structures defining individual work yards and utilitarian spaces. Numerous tenant houses dot this landscape lending to its multi-use utilitarian character.

*Condition – Good*

**Views and Vistas (both internal and perimeter or distant vistas):** The westward sloping hillside affords open vistas to the west from higher elevations. *Condition – Good.*

**Topography and Terrain:** Westward slopes retain their integrity, with no visible signs of erosion requiring attention. *Condition – Good.*

**Vegetation:** Vegetation within the work yard landscape is limited to tree rows and individual trees around the perimeter of suable utilitarian spaces and small domestic yards near tenant houses. *Condition – Good.*



**Water Features and Hydrology:** Terrain slopes westward toward the banks of the Little River comprising the westward edge of this landscape area. *Condition – Good.*

**Circulation:** Circulation features throughout the work yard landscape are limited to gravel drives and parking areas. No formal pedestrian ways exist within this park space. *Condition – Fair, requiring rehabilitation of existing drives and establishment of designated parking spaces.*

**Structures (non-habitable; walls, fences, etc.):**

Stone retaining walls and fences define this classification of features throughout the work yard landscape. *Condition – Fair. Fencelines have been recently improved, retaining walls are in good condition.*

**Small Scale Features and Objects (Urns, Signs, etc.):** N/A

**Short Term Activation Improvements:** Modifications anticipated to permit public access for limited early activation of the work yard landscape includes gates to control desired levels of public and guest access to this area; fence line rehabilitation and updated regulatory and interpretive signage. Modest costs may include uniform accessibility to one or more tenant houses.

### B1.3 Oak Hill Landscape Character Areas 3, 4, and 5 (LCA 3, 4 and 5) – Natural & Agricultural Landscape Character Areas

The majority of Oak Hill's lands, over 1,000 acres, is characterized by a landscape of natural beauty and cultivated agricultural areas. This landscape is divided into three sub-areas defined in part by the Little River, and each area's position north, west, or south of the domestic landscape area. LCA 3 largely comprises the agricultural lands south of the domestic core, what is today known as the South Farm. LCA 4 comprises the flat and northward rolling agricultural lands west and north of the Little River, including the lands today referred to as the North Farm. LCA 5 comprises the lands immediately north of the domestic core and lying inside the bend of the Little River as it turns eastward. Known Native American sites exist along the banks of the Little River and its tributaries, as do vestiges of former uses, including old mills, historic railroad trace, and a quarry site (that yielded the fossils and dinosaur footprints in paving stones at the house site). Views to the Manor House, and of the surrounding area are handsomely well-preserved.

*Observations/ Opportunities – Encompassing most of the land to be acquired for the future park, this pristine and healthy landscape holds the greatest potential to support new and compatible uses including multi-use trails, and other uses sensitively sited in response to natural features, cultural sites (Native American) and important viewshed and vistas. Continuing agricultural uses across the lands not employed for park programming or recreational use will retain the important natural and cultivated open character of these areas.*



**Spatial Character:** Preserved in large part due to long-standing agricultural uses, these lands retain their general open spatial character, divided by rivers, and tree lines separating fields, and individual farmsteads north and south of the core historic area. *Condition – Good*

**Views and Vistas** (both internal and perimeter or distant vistas): Vistas to the hilltop manor house are less apparent from the south and west. Prominent views from points north abound. Exterior views from Route 15 afford nearly 2-miles of frontage view of the Oak Hill landscape. *Condition – Good*

**Topography and Terrain/ Water Features and Hydrology:** The rolling topography of Oak Hill's perimeter fields and forests are mildly dissected by the property's hydrological conditions. The Little River flows northeasterly through the property, drawing from the raceways extending to it from the nearby historic Aldie Mill to the southwest. The remnants of a 19<sup>th</sup> century railroad bed in the far northeast corner of the property remain visible today. *Condition – Good*

**Vegetation:** Vegetation along the property's perimeter landscape areas are dominated by agricultural fields, presently in turf propagation. Riparian vegetation runs along the courses of





the Little River, and volunteer successional tree lines grow along generations old fence lines that dissect the agricultural fields. *Condition – Good*

**Circulation:** The exterior of these areas are defined by the perimeter roads circulating the property and provide access along Tail Race Road to the west and north, Route 15 to the east, and Route 50 to the south. Oak Hill Farm Road forms a semicircular arc, entering and exiting onto Route 15 to the east and serves as the primary ingress and egress. Access from the southernmost entrance onto Oak Hill Road from Route 15 provides good line of sight and appears to be the safest point of entry. Road conditions are good;

however, it is noted that increased traffic on Oak Hill Farm Road would require improvements to the existing farm lane. *Condition – Good*



**Structures** (non-habitable; walls, fences, etc.): The network of many farm fences which range from post and wire, to post and rail fencing exist in various states of repair. *Condition-Fair to Poor*

**Small Scale Features and Objects** (Urns, Signs, etc.): N/A

**Short Term Activation Improvements:** Modifications anticipated to permit public access for limited early activation are anticipated to include site access, parking, site identification, regulatory, and interpretive signage, and several miles of natural surface trails.

## B2. ARCHITECTURAL FEATURES

Oak Hill boasts an extensive, unique, and highly intact array of buildings spanning multiple time periods. As a whole, they represent an extremely rare opportunity to explore historical, cultural, and agricultural themes of Virginia in the 19th century through the mid-20th century. Oak Hill has the distinct interpretive advantage of both major and minor buildings of James Monroe's occupancy, as well as subsequent and evolving epochs of agricultural production. Because the structures have been well maintained under the stewardship of each owner, including the wise use of durable standing seam metal roofing, the value of the structures is even more enhanced. The well-preserved condition of the buildings is significant and unusual in a collection of this importance.

- The structures represent three major time periods: the President Monroe Occupancy, the Post-Monroe to ca. 1940 Era, and the 1940s to Present Day.
- Eight structures on the National Historic Landmark property are identified as associated with President Monroe, including the Main House, the Cottage (Judge Jones House), the Smokehouse, the Spring House, the Blacksmith Shop, the Stallion Barn (ruins), the Brick House (ruins) and a portion of the Barn nearest the Main House. The Main House appears to retain the majority of its Monroe-era design features. The earlier Judge Jones House is an incredible time capsule featuring frame construction with brick infill and many original features. Most of the other Monroe structures are also largely intact and in good condition. The Stallion Barn and Brick House ruins have great potential to be stabilized and retained for interpretive purposes. There is little to no intrusion of modern structures within the historic core of the property.
- The post-Monroe period includes most of the buildings in the Landmark listing. These are related primarily to the extensive agricultural operations of Oak Hill and contribute to the property's significance. Among them are the impressive three-story Main Barn with its overhead track system for delivering silage, the adjacent Dairy Barn with intact wood ceiling, and supporting barns and outbuildings. A collection of tenant houses date to this period, most small and modest, the largest being the Manager's House. Each is currently occupied and appears to be in good condition. Continued tenant or short-term use is both viable and compatible.
- Combined, the buildings present a comprehensive picture of early 19th to early 20<sup>th</sup>-century farm operations that is perhaps without equal in this country.

The following summary of observations of Oak Hill's architectural features is organized by landscape character area described in the preceding section.

### B2.1 Oak Hill Landscape Character Area 1 – Structures

**Priority Structures:** The following structures are identified as priorities for preservation and rehabilitation as they are likely central to the property's primary historical significance and benefit park operations. Structures below are listed based on their 1980 NHL listing number.

## 1. Manor House

The 1822-23 Manor House is the premiere structure at Oak Hill, serving as President Monroe's private residence. The center block features the main entrance on the north side and a large double-height portico on the south side, overlooking the formal gardens. The wings to the east and west were sensitively extended in the 1920s, with porches at each end and a second floor added to each wing behind a parapet. Despite these changes, the main block remains largely unchanged from Monroe's occupancy and the overall character of the original design remains intact. The house is in overall good condition, with a 1920s copper shingle roof providing protection to the majority of the interior. Low-sloped membrane roofs on the lower portion of the wings are an immediate concern and should be replaced with a longer-lasting solution with improved drainage design.



## 2. The Cottage



The Cottage, or Judge Jones House, dates from the period of Jones-Monroe shared ownership constructed sometime between 1794-1808. The weatherboarded, side gabled house is built into a hill, with access to the lowest portion from the back and to the second floor from the front. A two-level porch dominates the rear elevation, and a gabled projection extends to the south. The house has a tremendous collection of early material, including portions of exterior siding, exposed wood beams on the interior, masonry-infilled timber construction, early doors and hardware, and an early winder staircase. The house has been painstakingly well cared for and requires minimal repairs to the corrugated metal roofing, as well as careful pruning of surrounding trees to better protect the house from storm damage. The Cottage can easily be considered the most historically significant structure at Oak Hill beyond the Manor House itself.



### 3. Smokehouse

The smokehouse is a two-story, side-gabled masonry structure built into a hill, allowing both levels to be accessed from grade. The structure is in close proximity to the Manor House and is associated with the Monroe Era with minimal design changes, save for masonry arches added to the front elevation in the 1920s. Through vines obscure a full assessment of the masonry, the walls appear to be in overall good condition with only localized areas of minor cracking. The roof is clad with the same durable 1920s copper shingles found on the Manor House. Careful removal of the vines should be performed to slow masonry damage.



### 4. Springhouse

Now dominated by an impressive shingle-clad, flared tower, the original Monroe-Era Spring House consisted only of the stone-walled gable-roofed portion at the base, which itself was expanded to the south with a lattice-walled addition. The tower and south addition are thought to date from the last quarter of the 19th century, with the tower designed to provide pressure by gravity to the house's indoor plumbing system. The structure has been well preserved and the unpainted shingle exterior regularly maintained. Continued timely repair and maintenance will be required.



### 6. Stallion Barn

The Stallion Barn is thought to date to the Monroe Era and consists primarily of partial stone walls, though a few wood elements remain. The structure is covered with vines that are likely aiding the structure's continued stability. Removal of vines should be attempted only after the vines have been cut and allowed to dry out in order to minimize damage. A temporary structure is recommended to protect the ruin from further deterioration and allow time for study and stabilization. Access around the structure should be controlled by fencing.



### 18. Tenant House



The 19<sup>th</sup> century tenant house at the western edge of the Domestic Landscape is a one-and-a-half story wood-framed house with weatherboard siding. Two exterior doorways on the front elevation suggest a former life as a duplex; however, the interior is now a combined living space with large attic above. A basement level, accessed from the rear, has garage door bays, two of which are now infilled. A standing-seam metal roof has been instrumental in preserving the building, which currently requires only minor maintenance and repair.

**Lower Priority Structures:** The following structures are identified as lower priorities for preservation and should be studied to assess future investment.

The modern greenhouse (NHL #19) adjacent to the #18 Tenant House is of recent construction, upgraded and modernized by the current owners and in good condition. The masonry base of the current greenhouse is of earlier construction, likely from the mid-20<sup>th</sup> century.



## B2.2 Oak Hill Landscape Character Area 2 – Structures

**Priority Structures:** The following structures are identified as priorities for preservation and rehabilitation as they are likely central to the property's primary historical significance and benefit park operations. Structures below are listed based on their 1980 NHL listing number.



**5. Blacksmith Shop** The single-room, wood-framed Blacksmith shop is thought to be a Monroe-Era structure. The building has a wood shingle roof and vertical wood siding. The brick chimney mentioned by the NHL has been dismantled. The framing has been partially supplemented with new material, but has significant deterioration to top plates, corner posts, and sills and requires stabilization and repair.



## 7. Barn

The barn nearest the house is suspected to include components of a Monroe-Era barn at the east end. The barn was later extended to the west, potentially in several phases, to create a linear barn for horses and a square portion at the southwest portion for cows. Board-and-batten siding and standing-seam metal roofing are typical on all portions. Minor sill damage along the north elevation and deteriorated siding were typically observed.



## 21. Tenant House



Tenant House #21 is a one-and-a-half story shingle-sided house with standing-seam clad gable roof and shed-roofed appendage. The house is thought to date to the late-19<sup>th</sup> century and is one of four nearly identical tenant houses, along with #42, #43, and #49. Of the four, #21 is the only one with a basement and is the only one that retains an intact varnished board interior. Overall, the house is in good condition with minimal exterior repairs required.



### 23. Pump House



The Pump House is a tenant house containing well pumps in a space toward the south end. The structure reportedly began life as a ca. 1920 shed structure and was later retrofitted by the current owners into a living space. The exterior is weatherboarded and has a standing-seam roof. Vegetation, including sizeable trees growing in close proximity to the exterior walls, threaten the envelope of the structure and should be cleared.

### 25. Main Barn



The late-19<sup>th</sup> century Main Barn is an impressive three-story gabled structure with board-and-batten siding, a standing-seam metal roof, and one of originally two concrete silos remaining at the east end. A complex overhead track system remains largely intact to carry sileage from the silos to the various levels of the barn and to the adjacent dairy barn. The lowest level features impressive stonework and trusses. Overall, the building is in remarkably good condition, requiring minor repairs to siding and roof.



## 26. Dairy Barn



The Dairy Barn lies south of the main barn and is connected by a second-floor connector. The late-19<sup>th</sup> century, linear, gable-roofed structure has board-and-batten siding and a standing-seam metal roof. Intact wood sash windows line both long elevations. An unpainted wood ceiling is consistent throughout the interior and the overhead track system from the main barn passes overhead. The building is in overall good condition but has some localized water damage from a history of leaks.

## 36. Tenant House



Tenant House #36 is a linear house set on a full basement that can be accessed from grade. A porch extends most of the front elevation. The NHL Nomination suggests that this building served as the boarding house for unmarried farm workers, which may explain its linear design. The exterior is clad with wood shingles and the roof has modern standing-seam panels. The main level has been fully updated to serve as a single living unit. The house is in overall good condition, but requires exterior painting, particularly on the south side. Trees in front of the house should be carefully trimmed to allow more airflow to the exterior materials.

### 38. Machine Shop



The Machine Shop is a unique structure with a pyramidal form at the west end created by an enclosed windmill base. The eastern portion is a gable form with shed-roofed appendages. The structure is constructed on a hill, resulting in a total of three levels. Two dormers extend from the south-facing roof. Workbenches relating to the function of the building remain in place. The structure requires significant structural repair, and temporary shoring should be a high priority. A well at the west end of the building is not effectively covered and poses a safety concern. Access around the structure should be controlled by fencing.

### 42. Tenant House



Tenant House #42 is a one-and-a-half story shingle-sided house with gable roof and shed-roofed appendage. The house is thought to date to the late-19<sup>th</sup> century and is one of four nearly identical tenant houses, along with #21, #43, and #49. The roof is clad with corrugated metal panels, which are more susceptible to wind damage generally not as long-lasting as standing-seam roofs found elsewhere. Overall, the house is in good condition with minimal exterior repairs required.



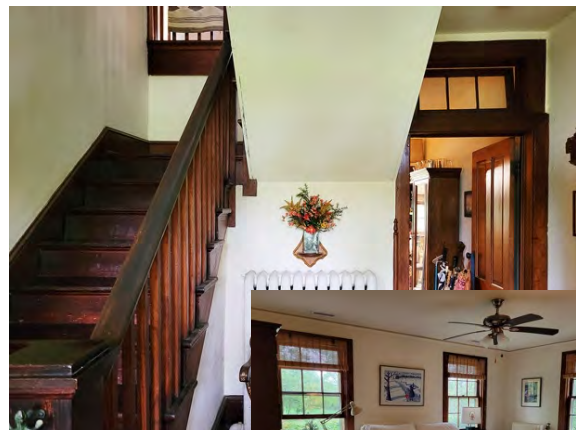
**43. Tenant House**

Tenant House #43 is a one-and-a-half story shingle-sided house with asphalt shingle roof and shed-roofed appendage. The house is thought to date to the late-19<sup>th</sup> century and is one of four nearly identical tenant houses, along with

#21, #42, and #49. The roof has been recently replaced with asphalt shingles that will have a much more limited lifespan over standing-seam roofs found elsewhere. Overall, the house is in good condition with minimal exterior repairs required.

**49. Tenant House - Ruin**

Tenant House 49 is the fourth of the matching late-19<sup>th</sup> century tenant houses, including #21, #42, and #43. The house was extensively damaged by fire at an unknown date and exists today as a ruin. It is recommended that vegetation be cleared around the ruin, that stabilization is completed, and that a structure be erected over the house to slow deterioration and allow time for study. Access around the structure should be controlled by fencing.

**50. Tenant House (Manager's House)**

The ca. 1920 Manager's House is the largest and most elaborate of the houses beyond the Manor House itself. The two-story house features unpainted wood shingle siding and a standing-seam metal roof. A porch extends most of the front of the house at the first floor. The interior finishes, including flooring, doors, and trim remain largely intact from construction. Minimal work is required beyond general maintenance.



## 52. Tenant House



Tenant House #52 is an L-shaped late-19<sup>th</sup> century house with weatherboard siding and a standing-seam metal roof. Shed-roofed porches extend from front and back. The house is in overall good condition, requiring minimal exterior repairs.

**Lower Priority Structures:** The following structures are identified as lower priorities for preservation and should be studied to assess future investment.

The Work Yard Landscape features a variety of smaller support buildings in the form of sheds and small barns, each of which served an important role in the daily operations of Oak Hill. Overall, these structures are largely intact and in encouragingly good condition thanks in large part to the widespread installation of standing-seam metal roofs, which have kept the structures dry. Vertical board-and-batten siding is consistent on most structures, and is largely intact, with most buildings requiring only minor patching and painting. A barn (#51) at the south end of the Work Yard requires more extensive structural stabilization. A small number of structures, namely several sheds at the west and northern edges of the Work Yard, have largely collapsed and are recommended for recordation and removal for safety.



## B2.3. Oak Hill Landscape Character Areas 3, 4, and 5 – Structures

**Priority Structures:** The following structures are identified as priorities for preservation and rehabilitation as they are likely central to the property's primary historical significance and benefit park operations. Structures below are listed based on their 1980 NHL listing number.

### 8. Brick House (Ruins)

The Brick House is located at the far southeastern corner of the Oak Hill site and is a masonry ruin of a two-story side-gabled house. The construction date of the house is unknown, with the NHL placing it between 1818 and 1830, though some details observed onsite would suggest a later date. Stabilization of the ruin is recommended along with construction of a protective structure to shield the ruin from the weather, preserving it while further study takes place. Access around the structure should be controlled by fencing.



### 56. Tenant House



Tenant House #56 is an L-shaped late-19<sup>th</sup> century house with novelty siding and an asphalt shingle roof. A shed-roofed addition is on the rear and an enclosed porch is in the inside corner of the L. The interior retains early trim and beaded-board walls and ceilings. The house is in overall good condition, though the asphalt shingle roof has a significantly reduced lifespan versus the standing seam found elsewhere.



### 63. Shingle House

The Shingle House is a two-story tenant house associated with the South Farm. The house dates from the late-19<sup>th</sup> century and features a flared, shingled upper portion and novelty siding-clad lower portion. The roof is standing seam. The house was renovated by the current owners, though some early elements remain on the interior. The house retains original window sash on the front elevation with small colored lights. Overall, the house is in good condition with minor repairs required on the exterior.



### 64. North Farm House

The North Farm House dates from about 1910 and is a two-story house, square in plan, with an open porch on the south side and entry porch on the west side. The house is clad with novelty siding and has a standing-seam roof. Some early interior features remain in place. Overall, the house is in good condition with minor repairs required on the exterior.



**Lower Priority Structures:** The following structures are identified as lower priorities for preservation and should be studied to assess future investment.

The larger Natural & Agricultural Landscape area features a variety of support buildings in the form of sheds and barns. Both the north and south farms feature their own barns, with the South Barn (NHL #60) being of considerable size and requiring greater structural stabilization. Two sheds near the south barn have collapsed and are recommended for documentation and removal for safety reasons. A grouping of four metal silos relate to modern farm operations but are no longer used.

Overall, the majority of these supporting structures are largely intact and in encouragingly good condition thanks in large part to the widespread installation of standing-seam metal roofs, which have kept the structures dry. Vertical board-and-batten siding is consistent on most structures, and is largely intact, with most buildings requiring only minor patching and painting.

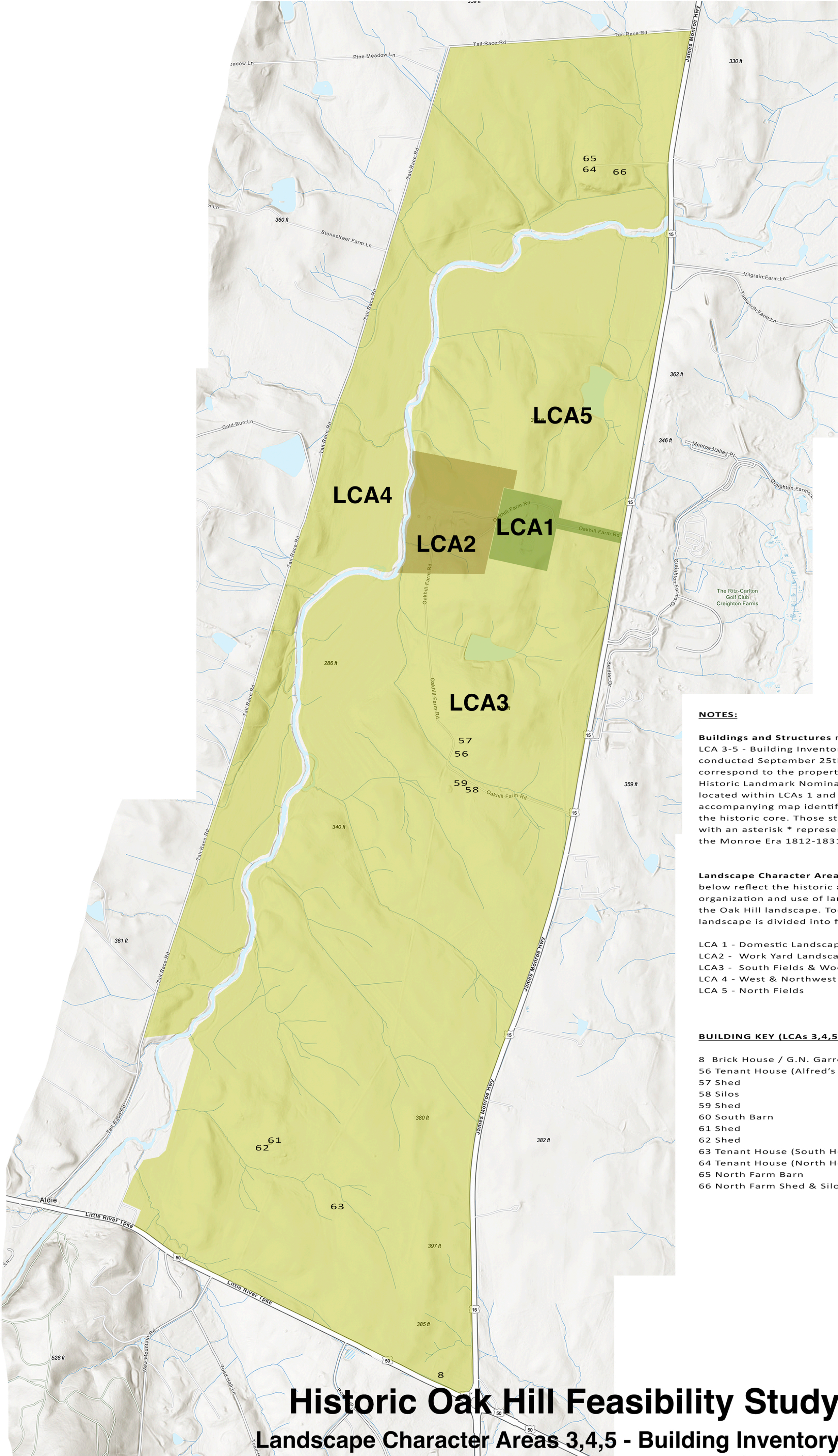


## B3. ANALYSIS MAPPING

The features discussed in the preceding landscape and architectural conditions assessments are presented on the accompanying analysis maps documenting landscape character and individual buildings at both the property-wide and historic core scale.

- ***Landscape Character Areas - Building Inventory***
- ***Historic Core - Building Inventory***





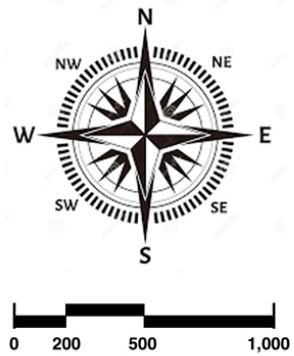
**NOTES:**

**Buildings and Structures** represented on this LCA 3-5 - Building Inventory reflect field work conducted September 25th-27th, 2024 and correspond to the property's 1985 National Historic Landmark Nomination. Buildings located within LCAs 1 and 2 are shown on an accompanying map identifying features within the historic core. Those structures identified with an asterisk \* represent features dating to the Monroe Era 1812-1831.

**Landscape Character Areas (LCAs)** represented below reflect the historic and contemporary organization and use of landscape spaces across the Oak Hill landscape. Today, the Oak Hill landscape is divided into five (5) LCAs.

- LCA 1 - Domestic Landscape
- LCA2 - Work Yard Landscape
- LCA3 - South Fields & Woodlots
- LCA 4 - West & Northwest Fields & Woodlots
- LCA 5 - North Fields

- BUILDING KEY (LCAs 3,4,5):**
- 8 Brick House / G.N. Garrett\*
  - 56 Tenant House (Alfred's House)
  - 57 Shed
  - 58 Silos
  - 59 Shed
  - 60 South Barn
  - 61 Shed
  - 62 Shed
  - 63 Tenant House (South House)
  - 64 Tenant House (North House)/S.L. Govenuer
  - 65 North Farm Barn
  - 66 North Farm Shed & Silo





LCA 4 - West & Northwest Fields & Woodlots

LCA 2 - Work Yard Landscape Unit

LCA 5 - North Fields

LCA 1 - Domestic Landscape Unit

LCA 3 - South Fields & Woodlots

NOTES:

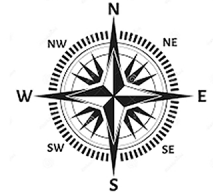
**Buildings and Structures** represented on this Historic Core - Building Inventory reflect field work conducted September 25th-27th, 2024 and correspond to the property's 1985 National Historic Landmark Nomination. Those structures identified with an asterisk \* represent features dating to the Monroe Era 1812-1831.

**Landscape Character Areas (LCAs)** represented below reflect the historic and contemporary organization and use of landscape spaces across the Oak Hill landscape. Today, the Oak Hill landscape is divided into five (5) LCAs.

- LCA 1 - Domestic Landscape
- LCA2 - Work Yard Landscape
- LCA3 - South Fields & Woodlots
- LCA 4 - West & Northwest Fields & Woodlots
- LCA 5 - North Fields

BUILDING KEY:

- 1 Manor House\*
- 2 Monroe Cottage\*
- 3 Smokehouse\*
- 4 Springhouse\*
- 5 Blacksmith Shop\*
- 6 Stallion Barn (Ruin)\*
- 7 Barn\*
- 18 Gardeners Cottage (Tenant)
- 19 Greenhouse
- 20 Storage Bldg
- 21 Tenant House
- 22 Shed
- 23 Pump House (Tenant)
- 24 Corn Crib/Run In Shed
- 25 Main Barn
- 26 Dairy Barn
- 27 Small Barn
- 28 Shed (Ruin)
- 29 Shed (Ruin)
- 30 Scale Bldg
- 31 Equipment Shed
- 32 Shed
- 33 Small Barn
- 34 Office/Library
- 35 Outhouse
- 36 Tenant House
- 37 Shed
- 38 Machine Shop
- 40 Barn
- 41 Wagon Shed
- 42 Tenant House
- 43 Tenant House
- 44 Shed
- 45 Outhouse (Ruin)
- 46 Shed
- 47 Shed
- 48 Wagon Shed
- 49 Tenant House (Ruin)
- 50 Farm Managers House (Tenant)
- 51 Barn
- 52 Tenant House
- 53 Shed



Historic Oak Hill Feasibility Study  
Historic Core - Building Inventory

Updated 10/30/2024



# APPENDIX C: ARCHAEOLOGICAL ASSESSMENT (MANAGEMENT SUMMARY)

The William & Mary Center for Archaeological Research (W&MCAR) conducted a background review as part of a feasibility study for James Monroe's Oak Hill property in Loudoun County, Virginia. The intent of the background review was to provide context and information about the archaeological sensitivity of the property. The findings presented within this management summary are expanded upon in the *Archaeological Assessment – Oak Hill Feasibility Study of James Monroe's Oak Hill*, and have been presented to the Virginia Department of Conservation and Recreation to inform future management.

## MANAGEMENT SUMMARY

Information about previously recorded resources within 1.6 km (1 mi.) of the property was used to help generate expectations of the potential for significant cultural resources within the property. The work included a review of existing records of previously recorded cultural resources, previous professional cultural resource survey work that has been conducted in the vicinity of the project area, and relevant environmental characteristics, documentary records, and cartographic sources pertaining to the project area.

Fourteen archaeological resources have been previously identified within the project area, the majority of which were recorded based on surface collection within plowed fields. The property has not been previously subjected to systematic subsurface archaeological survey.

Based on the results of this background review, there is a high probability of archaeological resources within and adjacent to the current historic core area (curtilage), in the vicinity of previously recorded sites, and in areas where historic maps show structures.

The Oak Hill property contains evidence of human occupation from, at a minimum, the Early Archaic period (8000–6500 BCE) to the present day, within an area that has had minimal modifications to the landscape apart from agriculture and transportation improvements. Given the archaeological sensitivity of the property and the lack of systematic archaeological survey apart from surface survey of tilled fields, it is recommended that survey compliant with state and federal guidelines be conducted prior to any ground-disturbing activities. The Oak Hill property provides opportunities for public engagement, historic preservation education, and archaeological and historical research. The property holds research potential to address themes of Native American/pre-Contact settlement patterns, chronological changes in lithic and ceramic technology, and possibly trade, among others. At a minimum, the historic resources could provide insight into the lives of enslaved workers, agricultural innovation, farm organization through time, and the home life of James Monroe and his family. In addition to the variety of recorded and likely cultural resources at Oak Hill, there are also geological deposits bearing dinosaur footprints, as can be seen on flagstones in the formal garden and inside the mansion. The source of these deposits was identified but was unable to be examined due to extensive undergrowth, however this resource adds to the potential for future research and public engagement.



# APPENDIX D – HISTORICAL TIMELINE

This selective chronology provides a sampling of the historical events associated with Oak Hill and its inhabitants. These entries offer an impression of the property’s impressive historical scope and how these narratives interconnect with site experiences and the broad context of American history. The descriptions below are brief and infer intriguing nuance with certainty that there is much more for future curators and visitors to discover about these and other episodes of Oak Hill’s many histories.



1 Raptor Footprint - STACH pllc 2024

**Sinemurian Age (199-192 Ma<sup>i</sup>)**—Dinosaurs roam this land leaving fossils in stones, which are later quarried on site and placed around the manor house and in the formal garden.<sup>ii</sup>

**Early Archaic period (8000-6500 BCE)**—Human occupation of Oak Hill dates from at least this time, with Manahoac, Haudenosaunee, and Conoy people likely here during various periods into the 1700s CE.<sup>iii</sup>

**1776**—Young Lt. James Monroe, wounded while leading a charge at the Battle of Trenton, becomes a Revolutionary hero.<sup>iv</sup>

**1794**—Monroe, then a United States diplomat in France, joins his uncle Judge Joseph Jones in purchasing a 4,000 acre Loudoun County estate from Charles Carter.<sup>v</sup>

**1799-1802**—Monroe serves as a transformative Governor of Virginia leading expanded involvement in transportation and public education and increasing militia training.<sup>vi</sup>

**1808**—After the death of Judge Jones’ son, Monroe inherits full ownership of the Loudon County property. Over the next two decades, Monroe devotes limited time, as well as enslaved and free labor to the property by investing, often using borrowed funds, in agricultural enterprises ranging from livestock grazing to grain cultivation to distilling.<sup>vii</sup>

**1811-1817**—Serving as Secretary of State (and briefly as Secretary of War from 1813 to 1814) in President James Madison’s administration, Monroe increasingly uses his Loudoun property as a more convenient escape from Washington than Highland.<sup>viii</sup>



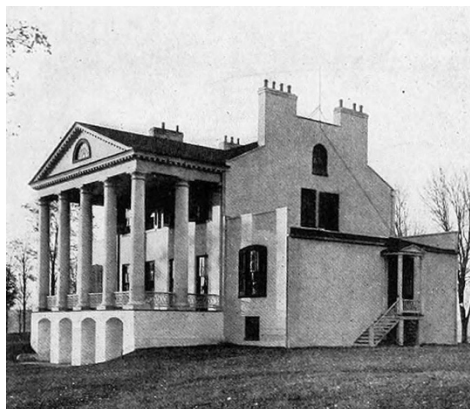
2 Judge Jones House - JKOA 2024

**1817-1825**—A practical one-day commute from the pressure, heat, and illness of Washington, now President Monroe and his family make his Loudoun farm, which he begins calling Oak Hill, among the earliest presidential retreats. The Monroes initially stayed in what is now called the Judge Jones House.<sup>ix</sup>

**1817-1819**—While Oak Hill becomes Monroe’s presidential retreat he embarks on a series of unprecedented presidential tours to New England (1817), the Chesapeake (1818), and the South (1819) engaging the people and fostering what became known as the “Era of Good Feelings.”<sup>x</sup>



**1820-1823**—Monroe engages White House architect James Hoban to construct a brick manor house at Oak Hill. The construction draws on free and enslaved labor, including Monroe’s enslaved carpenters Peter Malorrey and George Williams, and advice from Thomas Jefferson.<sup>xi</sup>



4 1915 View of South Facade. From - *Historic Virginia Homes and Churches*.



3 Manor House. View looking south toward north facade. STACH pllc 2024.

**1823**—Facing intense diplomatic and political pressure, Monroe crafts elements of what became the Monroe Doctrine while residing at Oak Hill.<sup>xii</sup>

**1825**—Former President Monroe twice hosts his longtime comrade, ally, and friend the Marquis de Lafayette at Oak Hill.<sup>xiii</sup>



6 Samuel Morse painting of President James Monroe White House Portrait. Circa 1819. LOC



5 Marquis de Lafayette Mantel. Source: Ken Garrett.

**1825**—Monroe joins his longtime friends and political allies Thomas Jefferson and James Madison on the University of Virginia’s board of visitors contributing to its early operation and governance from its opening to students that same year.<sup>xiv</sup>

**1828**—Monroe sells several enslaved families (including some people who had previously resided at Oak Hill) from his Highland estate to the Casa Bianca plantation in Monticello, Florida. There they work alongside enslaved people previously held on the slave-ship *Antelope*, captured in 1820 by the United States for violating anti-slave trade laws signed by then President Monroe.<sup>xv</sup>

**1829**—In his last public service role, Former President Monroe represents Loudoun and Fairfax Counties in the convention called to revise Virginia’s Constitution. The delegates elect him the presiding officer, but he withdraws on December 8, due to poor health.<sup>xvi</sup>

**1830**—Former First Lady Elizabeth Monroe dies at Oak Hill. Her despondent husband soon leaves to join his daughters Eliza Hay and Maria Gouverneur in New York, where he dies on July 4, 1831.<sup>xvii</sup>



7 John Vanderlyn painting of Elizabeth Kortright Monroe, Date Unknown. LOC.

**1838**—Samuel Gouverneur, the president’s son-in-law and executor, sells some people enslaved by Monroe at Oak Hill to plantations in Louisiana.<sup>xviii</sup>

**1850**—Maria Gouverneur, the first presidential child married in the White House and heir to Oak Hill, dies at the manor house.<sup>xix</sup>

**1852-1870**—John Fairfax purchases Oak Hill and builds out the agricultural complex. While he serves as a Confederate Lt. Colonel, the Union confiscates Oak Hill. The Freeman’s Bureau restores Oak Hill to Fairfax early in Reconstruction.<sup>xx</sup>

**1861-1865**—Civil War fighting skirts Oak Hill along the Little River Turnpike in 1863 during the Battle of Aldie and in 1864 during the cavalry engagement at Mount Zion Church.<sup>xxi</sup>

**1863**—While bivouacked at Oak Hill in route to Gettysburg, Union General George Meade orders his troops to spare the former presidential residence from pillaging.<sup>xxii</sup>

**1870-1885**—Dr. George Quinby and his wife Mary own Oak Hill and run a large dairy operation employing both Black and white farm laborers and house servants.<sup>xxiii</sup>

**1885-1920**—Henry Fairfax, son of John W. Fairfax, reacquires Oak Hill and makes it “one of the show places of Virginia” while breeding hackney horses and cattle. After his death in 1916, his wife Eugenia Tenant Fairfax sells the property.<sup>xxiv</sup>

**1920-1948**—Owner Frank Littleton enlarges Oak Hill’s manor house, enhances its agricultural operations, and establishes the formal garden.<sup>xxv</sup>



8 Aerial photo looking north toward the Littleton-era gardens. Source TCF 2024.

**1948-Present**—Generations of the DeLashmutt family maintain Oak Hill as their private residence while preserving its natural and cultural resources. The family is currently considering a bargain sale of the property for ultimate transfer to the Commonwealth for public stewardship.<sup>xxvi</sup>

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<sup>i</sup> Ma=million years ago.

<sup>ii</sup> “[Oak Hill tracksite: Early Sinemurian, Virginia](#),” collected by C. Gilmore & N. Boss 1920, 1926, *Paleobiology Database*.

<sup>iii</sup> Date supplied by archeologist Elizabeth Monroe. Beth Chambers, “[Loudoun County Before the Europeans — Indians of the Virginia Piedmont](#),” *The History of Loudoun County, Virginia*, reprinted from the Waterford Foundations 1983 publication, *Waterford Perspectives*. Appropriate tribal designations derived from various sources.

<sup>iv</sup> Tim McGrath, *James Monroe: A Life*, Kindle Edition. New York: Dutton, 2020, 33.

<sup>v</sup> Lori Hinterleiter Kimball and Wynne C. Saffer, “[The People Enslaved by President Monroe](#),” *Bulletin of Loudoun County History*, 2020-2021 Edition, 56 (and footnote 1). Lynn A. Beebe, [National Register of Historic Places Inventory-Nomination Form, Oak Hill](#), prepared September 20, 1985, 20/37. McGrath, 286.

<sup>vi</sup> American Battlefield Trust, “[James Monroe Fifth President of the United States](#).”

<sup>vii</sup> Daniel Preston, Founding Editor, The Papers of James Monroe, Retired UMW, “Oak Hill – Statement of Significance and Context Relative to the Monroe Occupation”, unpublished summary prepared for the Oak Hill Feasibility Study, November 2024. Beebe, 21/37. Gerard W. Gawalt, “[James Monroe, Presidential Planter](#),” *The Virginia Magazine of History and Biography*, 101:2 (April 1993): 251-72 passim.

<sup>viii</sup> Preston, “Oak Hill – Statement of Significance and Context Relative to the Monroe Occupation.”

<sup>ix</sup> McGrath, 474. Preston, “Oak Hill – Statement of Significance and Context Relative to the Monroe Occupation.” As early as October 5, 1819, Monroe used “Oak Hill” as the location from which he was writing his friend, Thomas Jefferson, [James Monroe to Thomas Jefferson, October 5, 1819](#), Library of Congress, Manuscript Division, Thomas Jefferson Papers, series 1.

<sup>x</sup> McGrath, 384-402, 414, 428-34. James Monroe’s Highland, Teacher Resources, “[The Era of Good Feelings](#).”

<sup>xi</sup> Preston, “Oak Hill – Statement of Significance and Context Relative to the Monroe Occupation.” Beebe, passim. For biographical information on Malorrey and Williams identifying them as carpenters and connecting them to Oak Hill during the period of construction, see James Monroe’s Highland, “[Who Was Enslaved at Highland](#).”

<sup>xii</sup> McGrath, 515 [read in the context of 508-30].

<sup>xiii</sup> Lafayette visited Oak Hill with President John Quincy Adams on August 7-9, 1825 and stopped again for the night of August 24, 1825, on his return to Washington City after visiting Jefferson at Monticello and Madison at Montpelier a few days earlier. The Lafayette Trail, Inc., “[The Lafayette Trail Map](#).” McGrath, 558.

<sup>xiv</sup> Preston, “Oak Hill – Statement of Significance and Context Relative to the Monroe Occupation.” Gene Zechmeister, “[Timeline of the Founding of the University of Virginia](#),” Thomas Jefferson Foundation, July 5, 2011.

<sup>xv</sup> Miranda Burnett, “[Take Them In Families...](#)”

<sup>xvi</sup> Preston, “Oak Hill – Statement of Significance and Context Relative to the Monroe Occupation.” Christopher M. Curtis, “Reconsidering Suffrage Reform in the 1829-1830 Virginia Constitutional Convention,” *The Journal of Southern History*, 74:1 (February 2008): 89, 110, 123-24.

<sup>xvii</sup> McGrath, 558.

<sup>xviii</sup> Emilia Stanfill, “[Uncovering Their Stories: Tracing One Enslaved Community from Virginia to Louisiana](#).”

<sup>xix</sup> Lauren McGwin, “[A First Daughter’s White House Wedding: Etiquette Wars and a Celebration at Stephen Decatur’s House](#),” *White House History Quarterly*, 54 (2019), 20. University of Mary Washington, “[Maria Monroe Gouverneur](#),” Genealogy and Biography, *The Papers of James Monroe*.

<sup>xx</sup> Beebe, 26/37. Dating of agriculture buildings to this period by JKO Historical Architects. U.S. National Archives, United States Freedmen’s Bureau Records, Field Offices, Virginia (M1913), Leesburg, Roll 101, Contracts and Indentures, 1865-1868, Monthly Report of Lands, Loudoun Co., [4<sup>th</sup> District, in the State of Virginia, For the Month of November 1866, Image 277](#), (Link requires access to Ancestry.com).

<sup>xxi</sup> For descriptions of these nearby actions, see American Battlefield Trust, “[Aldie](#)” and Northern Virginia Regional Parks Authority, [MT. Zion Historic Park](#), scroll to video titled “The Civil War at Mt. Zion Church & Aldie Mill.” Childs F. Burden offered a detailed account the Aldie action in an unpublished paper, “Prelude to Gettysburg,” delivered in 2009 at a Civil War Conference in Warrenton hosted by the Fauquier County Planning and History Associates.

<sup>xxii</sup> Marion Laffey Fox, “[Founder’s Farm: James Monroe’s Historic Oak Hill Estate](#),” November 1, 2013, *Preservation Magazine*, National Trust for Historic Preservation. Meade recounts visiting Mrs. Fairfax at Oak Hill in a letter to his wife from “Camp at Aldie, VA” dated June 25, 1863. He mentions the fine view from the Monroe



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estate, but makes no reference to orders protecting the place from damage or destruction. George Meade, *Life and Letters of George Gordon Meade*, volume 1, New York: Charles Scribner's Sons, 1913, 387-89.

<sup>xxiii</sup> Beebe, 26/37. 1870 Federal Census, [Southern District of Loudoun County, Virginia, Image 200](#), (Link requires access to Ancestry.com).

<sup>xxiv</sup> Henry Fairfax Dies at Age of Sixty-Six,” *Washington Evening Star*, July 12, 1916. “[Henry Fairfax](#)”, in *Encyclopedia of Virginia Biography*, Richmond, VA: 1915, (Link requires access to Ancestry.com).

<sup>xxv</sup> Marion Laffey Fox, “[Founder's Farm: James Monroe's Historic Oak Hill Estate](#).”

<sup>xxvi</sup> Hanna Pampaloni, “[Oak Hill Conservation Project Garner \\$22M in Support from Loudoun Board](#),” Loudoun Now, November 13, 2024.

# APPENDIX E - SUMMARY OF COMPARATIVE ANALYSIS

## KEY FINDINGS

The following narrative presents the study team’s analysis across a sampling of entities that may lend insight regarding organizational framework, funding models, and other metrics informing the creation of an Oak Hill State Park. This assessment identifies trends across a broad sampling of sites and is based on publicly accessible data. Trends observed offer insights as well as reveal challenges and cautionary lessons helpful to the park’s early formation and organizational development. The matrix of comparable sites assessed by the study team can be found appended to this summary.

Based on the study team’s review of the comparable entities, there are several evident opportunities and challenges relating to operating model, earned revenue, and programming. These findings inform the summary analysis presented below identifying trends for Operating Models and Revenues generated through support organization structure, philanthropy, and strategic partnerships.

	Public/ Private Operating Model	Revenue + Programming
<b>Opportunities</b>	<p>Entities that fall under a wider state-operated agency that specializes in park operations are more operationally sustainable and financially stable.</p> <p>The most successful cultural sites have business-oriented delivery models.</p> <p>Support organizations offer greater access to donations and grants, awareness building, and communications support</p> <p>Public-private partnerships that simply split roles and accountabilities more often operate with minimal disruption to their core functions. Such operating models provide the benefits and efficiencies associated with a non-profit entity while maximizing the credibility and significant knowledge base that public sector institutions can provide.</p>	<p>Individuals and organizations are seeking historical places of respite, recreation, and retreat.</p> <p>Entities where services are best aligned with site opportunities are the most successful.</p> <p>Accommodations, tiered admissions, agricultural leases, and venue rentals typically yielded the highest revenue.</p>
<b>Challenges</b>	<p>Historical properties with weaker control over their programmatic and site activations are less operationally and financially stable. Oak Hill should lean into its size and messaging to attract diverse revenue streams.</p>	<p>Smaller historical properties without robust paid programming and rental opportunities (earned revenue) are more likely to operate at a loss. Oak Hill should focus on core revenue generating services and gradually expand, leveraging the site’s assets to maximize revenue generation without compromising natural and cultural resource integrity.</p>



## E1. Sampling of Comparable Entities

In selecting these comparable entities, the study team prioritized specific factors for selection. Of the 26 sites and parks identified, each was grouped into an overarching typology. These typologies include comparable Virginia State Parks, environmental education or agricultural sites, Virginia cultural sites, sites with presidential ties, sites generating revenue through short-term rentals, and national presidential sites owned by either a state or federal entity. With some comparable entities falling in multiple categories, this includes the following typological breakdown:

- 6 Virginia State Parks (Sky Meadows, Sweet Run, Natural Bridge, Machicomoco, Culpeper Battlefields, Pocahontas);
- 3 sites related to environmental or agricultural education (River Farm, Shelburne Farms, Blandy Experimental Farm State Arboretum of Virginia)
- 4 Virginia presidential homes (James Monroe’s Highland, Monticello, Montpelier, Mount Vernon, River Farm);
- 4 additional Virginia cultural sites (Oatlands, George C. Marshall International Center, Jamestown Settlement and American Revolution Museum at Yorktown, Gunston Hall)
- 3 entities generating revenue through short-term rentals (Colonial Williamsburg’s Colonial Houses & Taverns, C&O Canal, Potomac Appalachian Trail Club)
- 6 National presidential sites owned by either a state or federal agency (James Buchanan’s Birthplace State Park, Franklin Pierce Homestead Historic Site, Grover Cleveland Birthplace State Historic Site, Lincoln’s New Salem State Historic Site, James K. Polk Home and Museum, Theodore Roosevelt Inaugural National Historic Site)

Of these comparable entities, 7 are within 30 miles of Oak Hill.<sup>i</sup> Nine are privately owned and operated.<sup>ii</sup> Another eleven are publicly owned and operated.<sup>iii</sup> The remaining are a mix of public-private partnerships, including publicly-owned sites with a significant portion of their operations or programs supported by private entities.<sup>iv</sup>

Site data concentrated on key characteristics including site manager, location, size, annual visitation, revenue and expenses, fees, membership and other notable sources of income, and existence of a friends group or support organization. Our research also captured interpretive lens including ties to slavery, and, if applicable, whether the site engages with descendent communities.

## E2. Key Insights and Considerations

The following summary presents trends observed across the comparative analysis to inform the development and operations of an Oak Hill State Park.

### E2.1 Operating Models

Across the sites analyzed, certain commonalities are apparent in terms of organizational structure, governance, legal structure, and overall operating model. Nine of the sites are state parks owned and operated by a state government agency. These include Culpeper Battlefields, Machicomoco, Natural Bridge, Pocahontas, Sky Meadows, and Sweet Run state parks in Virginia, Lincoln’s New Salem State Historic Site in Illinois, James Buchanan’s Birthplace State Park, and the Franklin Pierce Homestead

Historic Site in New Hampshire. **Of these nine state-run sites, seven have partner friends groups or 501c3 supporting organizations.** In general, these support organizations are largely accountable for mobilizing park volunteers and fundraising.

**Most of the state sites receive appropriations or other sources of government funding,** although generating earned revenue is also a core function of each. Somewhat uniquely, the Franklin Pierce Homestead Historic Site is part of [New Hampshire State Parks' self-funded system](#), which relies solely on earned revenue from park admissions, rentals, and skiing to support the park system's operations. The Homestead site operates seasonally with a [reported annual revenue](#) of \$7,815 in FY2018.

Two additional sites are operated by Virginia public institutions of higher education, including the Blandy Experimental Farm (University of Virginia) and James Monroe's Highland (William and Mary University).

**Another 9 of the comparable entities are owned and operated by private 501c3 nonprofit entities.** These include Colonial Williamsburg, Monticello, Montpelier, Mount Vernon, Oatlands, the Potomac Appalachian Trail Club, River Farm, Shelburne Farms, and the George C. Marshall International Center. This legal structure offers a governance and funding model that enables access to donations and grants, some ability to influence public policy, and, as described below, greater leverage for communications, fundraising, and partnerships. Of note are independent entities whose core missions and functions are entirely within the control of the organization such as Mount Vernon, Monticello, and Shelburne Farms. These non-profit sites offer mission-oriented, sustainable operations with limited government funding. **In contrast, sites that are operated by larger entities with broader (and sometimes disparate) missions are more likely to face budgetary and organizational instability,** including sites such as the American Horticultural Society's River Farm and Oatlands Historic House and Gardens. Oatlands' operations were recently taken over by the [National Trust for Historic Preservation](#) following the devolution of a four-decade old partnership with Oatlands, Inc. **Entities that are either directly in charge of their own mission and operations or those that fall under a wider state-operated agency that specializes in park operations are more operationally and financially stable and sustainable.**

**The remaining six comparable entities evaluated are publicly-owned with non-profit operators.** These include the C&O Canal rental properties, Grover Cleveland Birthplace State Historic Site, Gunston Hall, the James K. Polk Home and Museum, Jamestown Settlement and American Revolution Museum at Yorktown, and the Theodore Roosevelt Inaugural National Historic Site. **In some cases, such as Gunston Hall, a property owned by the Commonwealth of Virginia, a specific private supporting organization has been stood up to directly support that entity.** The Board of Regents of Gunston Hall, Inc and the Gunston Hall Foundation are chartered to support the operational and financial success of the site. Similarly, the James K. Polk Memorial Association operates the James K. Polk Home and Museum, a site owned by the State of Tennessee. This public-private operating model has been successful, though **all studied entities receive some form of government funding to support their operations. By clearly splitting public/private roles and accountabilities, these sites continue to operate with minimal disruption to their core functions.**

## E2.2 Earned Revenue and Site Programming Opportunities

**Programming and earned revenue opportunities are core functions of all sites evaluated.** While each comparable entity offers a diverse range of activities, common forms of revenue generation include general admission fees, paid programming, retail, and rentals. **Unlike many state or federal sites, most**



**private entities offer tiered access. Increased access comes at an increased price**, starting with grounds passes and mounting with garden, building, and occasionally museum or exhibition access.

Cultural sites generate revenue, build their brand, and underscore authenticity through free and paid programming. Program service revenue at the comparable entities include group and private guided tours, concerts, interpretive retail, themed teas, nighttime and holiday activations, and special exhibitions and events. At Colonial Williamsburg and Mount Vernon, additional fees are charged for private events with historical character interpreters.

**General admission passes for adults range from free (River Farm and James Buchanan’s Birthplace State Park in Pennsylvania) to lower cost (\$12 general admission at Gunston Hall) to high (\$36 for general admission to Montpelier).** In general, private non-profit organizations charge higher fees than public ones. Virginia’s premier presidential homes, including Monticello, Mount Vernon, and Montpelier, charge the highest fees but also offer the greatest range of cultural programming as part of admission. Oak Hill’s proximity and founding father affiliations could benefit from the existing presidential sites tourism economy in the state by being a more proximate, cost competitive alternative.

While grounds passes typically range from free to low cost, **some sites offered paid programming capitalizing on the natural environment.** Blandy Experimental Farms charges \$5 per day for adults using the arboretum’s bridle trails. Shelburne Farms— a gold standard for environmental sustainability and programming— offers plant, bird, and orienteering walks for \$5. Gunston Hall, River Farm, and Highland charge permitting fees for photography sessions. River Farm also charges an artist permit fee of \$5.

Some comparable entities are generating revenue from more robust educational activations. These include paid symposiums, such as Mount Vernon’s \$250 George Washington Symposiums. At Montpelier, the general public can join an Archaeological Expedition for \$950 per week. Shelburne Farms, the Jamestown-Yorktown Foundation, James K. Polk Memorial Foundation, and Blandy Experimental Farm offer **summer camps**. Shelburne Farms also offers extensive **low-cost educator courses** and pre-school programs. By investing heavily in education and research, these entities serve as poles of expertise, whether on a president or sustainable farming. They also capitalize on this education brand.

**Eleven out of 25 comparable entities offer overnight stays**, ranging from primitive campsites to elaborate short-term rental properties and inns. While the Colonial Williamsburg Houses & Taverns program provides lodging for a larger tourism enterprise, Oatlands, the Potomac Appalachian Trail Club (PATC), and the C&O Canal Trust properties are a destination in themselves, mixing both heritage and recreation. **Oatlands is most comparable to Oak Hill, offering the Story Book Stone Cottage for \$340 per night or the larger Oatlands Historic Hamlet Inn for \$900 per night on Airbnb.**

Booking options vary. State Parks, including the entities reviewed in Virginia and Illinois, book camping and primitive structures through state-run websites. Oatlands uses Airbnb after obtaining a special variance. Shelburne Farms, PATC, and Colonial Williamsburg use their own sites to book lodging. The National Park Service has a cooperative agreement with the Friends Group C&O Canal Trust to operate and book stays at its seven available lockhouses. In FY2023, the program yielded \$174,735 in revenue from 7 lockhouses. Accommodations at Blandy Experimental Farm are only available to researchers while Montpelier’s five cottage Constitutional Village is considered one complete venue rental for large

parties. Oak Hill’s accommodation approach should learn from other models but will be required to follow guidance and policies established by both the Commonwealth and Loudon County.

In addition to venue rentals and short-term rentals, multiple sites have also successfully leased land or offered service contracts for agricultural use. The most significant farm-lease programs reviewed by the study team included Sky Meadows, Sweet Run, and Machicomoco state parks, but there is evidence of commercial farming or residential or tenant leases at Oatlands, Shelburne Farms, and Blandy Experimental Farm.

The key findings of this analysis are presented earlier in this summary and revealed by the high-level analysis visible on the accompanying matrix of comparable sites.

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<sup>i</sup> Oatlands, George C. Marshall International Center, Sky Meadows, Sweet Run, Blandy Experimental Farm, C&O Canal rentals, and Potomac Appalachian Trail Club rentals

<sup>ii</sup> Oatlands, George C. Marshall International Center, Monticello, Montpelier, Mount Vernon, River Farm, Shelburne Farms, Colonial Williamsburg’s Colonial Houses & Taverns, and Potomac Appalachian Trail Club.

<sup>iii</sup> Sky Meadows, Sweet Run, Natural Bridge, Culpeper Battlefields, Pocahantas, and Machicomoco state parks, James Monroe’s Highland, Blandy Experimental Farms, James Buchanan’s Birthplace State Park, Franklin Pierce Homestead Historic Site, and Lincoln’s New Salem State Historic Site.

<sup>iv</sup> George Mason’s Gunston Hall, Jamestown Settlement and the American Revolution Museum at Yorktown, C&O Canal Quarters Program (on National Park Service property), Grover Cleveland Birthplace State Historic Site, James K. Polk Home and Museum, and Theodore Roosevelt Inaugural National Historic Site.

Note the sites and figures presented below reflect a cursory analysis of comparable sites across a broad cross section of public and private entities, affording observable trends, opportunities and challenges in the consideration of funding and operational models for a future Oak Hill State Park

	Site Information						Funding								Additional Components				Sources
	Site Name	Site Manager	Location	Size	Annual Visitation	Structure Date	Annual Revenue	Annual Expenses	Annual Net Income	Notable Sources of Revenue	Contributions (2023)	Earned Revenue (2023)	Short Term Rentals	Fees	Membership	Supporting Org or Friends Group	Agricultural Uses	Descendent Engagement	
Virginia State Parks	Sky Meadows State Park	Virginia Department of Conservation and Recreation	Delaplane, VA	1,860 acres	157,301 CY24 Data 260,896 CY20 384,705 CY19 233,205 CY18 268,940 CY17	1798 (log cabin)	\$350,891 Fiscal Year 2024	\$803,291 Fiscal Year 2024	(\$462,408) Fiscal Year 2024	Gift shop Camping	Admission: \$10/ car, \$20/ HOV, \$40/ bus Camping: \$20 (YA-primitive to \$44 (Non-resident Large Campground)) Large Shelter: \$138 Large Picnic Plat: \$64 Equestrian fee: \$4/ day	\$390,891	n/a		Annual Passport: \$85 Senior Passport: \$40 Disability Passport: free Veteran Disability fee: VA National Guard: free	Friends of the Sky Meadows State Park	Active farm engaging visitors in agricultural practices from Colonial times to present. Almost half the park is Unsewn Management Areas of pasture habitat and agricultural land managed jointly with the Virginia Department of Corrections for beef production.	As many as 14 people enslaved at Mount Bleak, with records showing 3 "slave cabins"	<a href="https://www.dcr.virginia.gov/state-parks/sky-meadows/general_information">https://www.dcr.virginia.gov/state-parks/sky-meadows/general_information</a> <a href="https://www.dcr.virginia.gov/state-parks/sky-meadows/wheather_info">https://www.dcr.virginia.gov/state-parks/sky-meadows/wheather_info</a> <a href="https://www.dcr.virginia.gov/recreational-planning/impalevacuum.pdf#pages=11-18">https://www.dcr.virginia.gov/recreational-planning/impalevacuum.pdf#pages=11-18</a> <a href="https://www.dcr.virginia.gov/state-parks/visit/mount-bleak-the-castle-of-the-meadows-state-park">https://www.dcr.virginia.gov/state-parks/visit/mount-bleak-the-castle-of-the-meadows-state-park</a> <a href="https://www.dcr.virginia.gov/document/Virginia-State-Parks-2023-Economic-Impact-Study.pdf">https://www.dcr.virginia.gov/document/Virginia-State-Parks-2023-Economic-Impact-Study.pdf</a> <i>*Sky Meadows is the closest, established 1919 near Oak Hill. Visitation at park is reported to be higher than Oak Hill was established with</i>
	Natural Bridge State Park	Virginia Department of Conservation and Recreation	Natural Bridge, VA	1540 acres	211,754 CY24 Data		\$2,537,628 Fiscal Year 2024	\$2,174,439 Fiscal Year 2024	\$363,189 Fiscal Year 2024	Merchandise Sales		\$2,537,628	primitive group campgrounds	Admission: \$9.00/adult, \$6.00/Child Camping: \$70-\$80	Annual Passport: \$85 Senior Passport: \$40 Disability Passport: free Veteran Disability fee: VA National Guard: free	Friends of Natural Bridge State Park			<a href="https://www.dcr.virginia.gov/state-parks/parking-fees">https://www.dcr.virginia.gov/state-parks/parking-fees</a> <a href="https://www.dcr.virginia.gov/state-parks/natural-bridge/general_information">https://www.dcr.virginia.gov/state-parks/natural-bridge/general_information</a>
	Sweet Run State Park	Virginia Department of Conservation and Recreation / Between the Hills Conservancy	Hillsboro, VA	884 acres	10,122* *Estimation off last 6 months of CY24. Visitation data not collected until 09/24.	Demory House 1848	<i>author revenue not collected until 09/2024</i> \$5,062 Fiscal Year 2024	\$889,419 Fiscal Year 2024	(\$884,356) Fiscal Year 2024	Admission Camping (in development)		\$5,062	N/A	Admission: \$10	Annual Passport: \$85 Senior Passport: \$40 Disability Passport: free Veteran Disability fee: VA National Guard: free	Friends of Sweet Run State Park operates as a branch organization of the Between the Hills Conservancy. (Formerly the Blue Ridge Center for Environmental Education). Transitioning to become the State Park's Friends support group.	DCR has two subseases for residential and agricultural uses with Between the Hills Conservancy. Property includes leased organic farm.	Integration about site being at confluence of slaveholding states (VA and MD) and one opposed to slavery (NC)	<a href="https://www.dcr.virginia.gov/state-parks/sweet-run/other_info">https://www.dcr.virginia.gov/state-parks/sweet-run/other_info</a> <a href="https://www.betweenthehillsconservancy.org/about-us/about-us-the-betweenthehillsconservancy">https://www.betweenthehillsconservancy.org/about-us/about-us-the-betweenthehillsconservancy</a> <a href="https://www.betweenthehillsconservancy.org/2021/11/08/intermediate-CLIN/304">https://www.betweenthehillsconservancy.org/2021/11/08/intermediate-CLIN/304</a> <a href="https://budget.hill.virginia.gov/document/2023/11/08/20/intermediate/CLIN/3/04">https://budget.hill.virginia.gov/document/2023/11/08/20/intermediate/CLIN/3/04</a>
	Culpeper Battlefield State Park	Virginia Department of Conservation and Recreation	Culpeper, VA	2,200+ acres	New Park 2024	none currently owned.	\$0	\$0	\$0	TBD Admissions and camping		\$0	N/A	Parking (Admissions) currently available at trailheads at no cost	TBD	Friends of Culpeper Battlefield & Historic Sites		Y	Park lands include properties with documented enslaved persons before and during the Civil War era. <a href="https://www.dcr.virginia.gov/state-parks/culpeper-battlefield">https://www.dcr.virginia.gov/state-parks/culpeper-battlefield</a> <a href="http://www.culpeperbattlefield.org/what-we-do">http://www.culpeperbattlefield.org/what-we-do</a>
Cultural	Machicomoco State Park	Virginia Department of Conservation and Recreation	Hayes, VA	645 acres	99,286 CY24 Data	1793-1797	\$205,461 Fiscal Year 2024	\$421,891 Fiscal Year 2024	(\$216,430) Fiscal Year 2024	Admission Camping Rentals Agricultural Merchandise Sales		\$205,461	3 Yurts: \$88/ night Boat Launch fee: \$3/ day Small Picnic Shelter: \$60/day Large Picnic Shelter: \$90/ day	Annual Passport: \$85 Senior Passport: \$40 Disability Passport: free Veteran Disability fee: VA National Guard: free	Friends of Machicomoco State Park, The Fairfield Foundation is also leasing and renovating Timberneck House. Lease amount is \$1.	Leased solicitation in July 2024 for 5 year agricultural lease	Y	Site associated with Rosewell Plantation. 31 identified archaeological sites. Native American village and associated sites. <a href="https://www.dcr.virginia.gov/state-parks/machicomoco">https://www.dcr.virginia.gov/state-parks/machicomoco</a> <a href="https://www.dcr.virginia.gov/recreational-planning/impalevacuum.pdf#pages=11-18">https://www.dcr.virginia.gov/recreational-planning/impalevacuum.pdf#pages=11-18</a> <a href="https://www.dcr.virginia.gov/document/Virginia-State-Parks-2023-Economic-Impact-Study.pdf">https://www.dcr.virginia.gov/document/Virginia-State-Parks-2023-Economic-Impact-Study.pdf</a> <a href="https://www.dcr.virginia.gov/state-parks/document/timberneck-house.pdf">https://www.dcr.virginia.gov/state-parks/document/timberneck-house.pdf</a> <a href="https://fairfieldfoundation.org/timberneck/">https://fairfieldfoundation.org/timberneck/</a> <a href="https://parks.dcr.virginia.gov/visit/visit/2024/04/04/VA-Park-304">https://parks.dcr.virginia.gov/visit/visit/2024/04/04/VA-Park-304</a>	
	Poconahontas State Park	Virginia Department of Conservation and Recreation	Chesterfield, VA	7,819 acres	1,152,195 CY24 Data	1935-1938	\$2,762,931 Fiscal Year 2024	\$2,728,783 Fiscal Year 2024	\$34,148 Fiscal Year 2024	Admission Camping Cabins Rentals and fees Merchandise Sales		\$2,762,931	1 Bedroom Cabin: \$171 Lodge: \$429 Banquet Hall: \$400	Annual Passport: \$85 Senior Passport: \$40 Disability Passport: free Veteran Disability fee: VA National Guard: free	Friends of Poconahontas State Park		Y	Includes interpretation about African American experience in VA, including slavery and segregation <a href="https://www.dcr.virginia.gov/state-parks/Poconahontas">https://www.dcr.virginia.gov/state-parks/Poconahontas</a> <a href="https://www.dcr.virginia.gov/state-parks/Poconahontas">https://www.dcr.virginia.gov/state-parks/Poconahontas</a>	
	Oatlands	Former ( c 2023): Oatlands Inc. Current: National Trust for Historic Preservation	Leesburg, VA	400 acres	c. 1808		\$1,111M	\$1,24M	(\$125K)	Contributions Program Services: \$252,496 Rental Property Income: \$208,182	\$648,688	\$462K	Oatlands Historic Hamlet Inc: \$900/ night Story book Stone cottage: \$340	Manxton Tour: \$20 Garden: \$50.00 Concerts: \$15/\$20 Tee: \$50/\$70 Cardinal Property Rights: \$20 SK: \$40	Annual Rental Price: not listed Listed: \$75.00 Individual: 65+ \$70.00 Group: \$125.00 Family: \$200.00	Vegetable and herb gardens	Y	133 men, women, and children were enslaved at Oatlands. <a href="https://projects.prophetic.org/nonprofit/organizations/54118655">https://projects.prophetic.org/nonprofit/organizations/54118655</a> <a href="https://oatlands.org/">https://oatlands.org/</a>	
	George Mason's Gunston Hall	Owned by Commonwealth of Virginia; operated by the National Society of the Colonial Dames of America via the Board of Regents of Gunston Hall Incorporated (BGHI) and the Gunston Hall Foundation	Lorton, VA	550 acres	20,000+ (2019)	1755-59	\$1M	\$1.5M	(\$498K)	Contributions Investment Income Program Services: \$61,871 Rental Property Income: \$41,415 Net Inventory Sales: \$65,089	\$767,499 (BRGH)	\$188K (BRGH)	n/a	Grounds Guard: \$1-\$6.00 General Admission: \$15-\$22.00 Starline: \$1-\$22.00 Christmas: \$9.40-\$17.25 Photography Session: \$50	Annual Revenue (2023): \$32,650	Gunston Hall Foundation supports BGHI, in FY2023, collected \$155,693 in revenue with \$218,467 in expenses.	Developing Riverside Garden Project	Program on the rise of slavery in Virginia and convergence of West African, European, and Native American cultures. <a href="https://projects.prophetic.org/nonprofit/organizations/52128368">https://projects.prophetic.org/nonprofit/organizations/52128368</a> <a href="https://gunstonsite.org/about/">https://gunstonsite.org/about/</a> <a href="https://projects.prophetic.org/nonprofit/organizations/54812140">https://projects.prophetic.org/nonprofit/organizations/54812140</a> <a href="https://m-connectorencounters.com/news/2006/feb/13/celebrating-black-history/">https://m-connectorencounters.com/news/2006/feb/13/celebrating-black-history/</a>	
Cultural	Jamestown Settlement and the American Revolution Museum at Yorktown	Jamestown-Yorktown Foundation (educational agency of the Commonwealth of Virginia)	Jamestown and Yorktown, VA	602,564 (2018)		\$19.5M (2019), \$4.47M from the General Fund	\$2.64M (FY Inc)	\$1.7M (FY Inc)	Contributions Program Services: \$164K (FY Inc) Investment Income: \$729K (FY Inc)	\$3.6M (FY Inc)	\$16.8K (FY Inc)	n/a	Single Admission: \$10 (youth), \$20 (adult) Combined Admission: \$17 (youth), \$34 (adult) Annual Park: \$27 (children), \$54 (adults) Historic Triangle: \$53 (youth), \$119 (adult) Private Tours: \$115.7 2 hours, \$170 both maximum Group Tours: \$20/adult, \$9/Student Combination: \$33.60/adult, \$14/Student Programming: 27-50 Summer camp: \$100 Event Rentals range from \$4,000 to \$12,000+ for indoor and outdoor rentals	n/a	JYF is governed by a Board of Trustees, consisting of the Governor, the Lieutenant Governor, the Attorney General, the Secretary of Education, General Assembly members, appointed citizens, the private affiliate president, and those elected by Board of Trustees. The Jamestown-Yorktown Foundation, Inc., a 501(c)(3) private affiliate, coordinates private fund development in support of JYF programs. \$18.25 million budget in FY18, 94.47% from the General Fund	Herb gardens and farm. Crops for interpretive use include fruit tree orchard and field for growing wheat, corn, tobacco, flax and cotton. <a href="https://606.virginia.gov/press/press/press/2024/04/04/VA-Park-304">https://606.virginia.gov/press/press/press/2024/04/04/VA-Park-304</a> <a href="https://www.jamestown.org/about-us/about-us-the-jamestown-foundation">https://www.jamestown.org/about-us/about-us-the-jamestown-foundation</a> <a href="https://projects.prophetic.org/nonprofit/organizations/31163864/2024-03-03/2024-03-03">https://projects.prophetic.org/nonprofit/organizations/31163864/2024-03-03/2024-03-03</a> <a href="https://sites.google.com/view/jy-foundation/dependent-affiliary-board">https://sites.google.com/view/jy-foundation/dependent-affiliary-board</a>			
	George C. Marshall International Center	George C. Marshall International Center, Inc.	Leesburg, VA	3.8 acres	1805-1824		\$880,451	\$732,403	\$148,048	Contributions Program Services Rental Property Income	\$571,578	\$274K	Adult public tour: \$15 Senior public tour: \$12 Student tour: \$5	Personal: \$10-250/month First Class: \$100/yr General's Staff: \$250/yr Order of Dobson: \$1000/yr 1941 Society: \$15K/yr Statesman: \$5000/yr Leadership Legacy: \$10K/yr		Property of Robert "King" Carter. In 1885, George Washington Ball sold the property to Amelia Young, a slaveholding farmer's widow. She sold it one year later. <a href="https://projects.prophetic.org/nonprofit/organizations/621381698">https://projects.prophetic.org/nonprofit/organizations/621381698</a> <a href="https://www.georgemarshall.org/">https://www.georgemarshall.org/</a> <a href="https://www.dodmanmar.org/architecture">https://www.dodmanmar.org/architecture</a>			



## Appendix E: Comparative Analysis Matrix - Page 2

Note the sites and figures presented below reflect a cursory analysis of comparable sites across a broad cross section of public and private entities, affording observable trends, opportunities and challenges in the consideration of funding and operational models for a future Oak Hill State Park.  
3/1/25

	Site Information						Funding						Additional Components				Sources			
	Site Name	Site Manager	Location	Size	Annual Visitation	Structure Date	Annual Revenue	Annual Expenses	Annual Net Income	Notable Sources of Revenue	Contributions (2023)	Earned Revenue (2023)	Short Term Rentals	Fees	Membership	Supporting Org or Friends Group	Agricultural Uses	Descendent Engagement	Ties to Slavery	
VA: Residential	James Monroe's Highland	William & Mary	Charlottesville, VA	535 acres	About 10,000	1799	\$700k (2020)	\$1.3M (2020)	(\$67K)	Contributions Entrance fees Gifts shop revenue Event rentals			n/a	Adult admission: \$18.00 Youth admission: \$13.00 Children under 5 free Group tours: \$150.00 Weddings: 77 Photography Sessions: \$50 Conferences and Meetings: \$750/half day to \$1,500 full day Corporate Programs: \$200-\$250 Grants: \$2,500-\$22 (AAHAT) Annual Pass: \$70-\$125 Local	Annual Revenue (2023): not listed Monroe's Farm Friends Family Pass: \$50.00 Local pass: \$50		Working farm (lease undetermined) Host of Albemarle County Fair	Y	53 unfree people have been documented living at Highland under Monroe's ownership. He enslaved a total of 178 individuals. <a href="https://www.wm.edu/about/administration/bowf_documents/meetings/2019_2020/2020-05-pre-financial-affairs-fy21-auxiliary-enterprises-detail.pdf">https://www.wm.edu/about/administration/bowf_documents/meetings/2019_2020/2020-05-pre-financial-affairs-fy21-auxiliary-enterprises-detail.pdf</a>	<a href="https://highland.org/">https://highland.org/</a>
	Monticello	Thomas Jefferson Foundation, Inc.	Charlottesville, VA	2300 acres	Over 300,000	1768-1809	\$56.9M	\$39.5M	\$17.4M	Contributions Program Services Investment Income Sales of Assets Net Inventory Sales	\$9.7M	\$18.7M	n/a	Other Tours: \$4-\$42 (adult) Private Guide: \$800 for 4 Slavery Guided Tour: free Venue Rentals Meeting Spaces Fraschetti & Academic	n/a	Maintains extensive vegetable and fruit gardens and seed programs. Full-time garden staff cultivates tobacco and wheat, along with produce.	Y	Jefferson enslaved over 600 human beings. 400 people were enslaved at Monticello, with around 130 people enslaved there any given time. <a href="https://projects.propublica.org/nonprofits/organizations/540505939">https://projects.propublica.org/nonprofits/organizations/540505939</a> <a href="https://www.monticello.org/">https://www.monticello.org/</a>	<a href="https://projects.propublica.org/nonprofits/organizations/540505939">https://projects.propublica.org/nonprofits/organizations/540505939</a> <a href="https://www.monticello.org/">https://www.monticello.org/</a>	
	Montpelier	Montpelier Foundation/ National Trust for Historic Preservation	Montpelier Station, VA	2,650 acres	Over 125,000	1760s	\$10.1M	\$6.13M	\$3.95M	Contributions Program Services Investment Income Rental Property Income Net Inventory Sales	\$8.4M	\$1.6M		Highlights Tour: \$0 to \$36 (adult) Property Pass: \$0 to \$13 (adult) Virtual Group House Tour: \$750 Venue Rentals (David M. Rubenstein Visitor Center, Lewis Hall, Claude Moore Hall) Archaeological Expeditions: \$950/week (dependent on cost) Educator Seminars: \$85	Annual Revenue (2023): not listed Individual: \$50 Couple: \$75 Family: \$100 Fund Memberships: \$210-\$25,000 Tree Sponsorships: \$250-\$1,000			Y	From 1723-1844, 6 generations of more than 300 people lived in slavery at Montpelier. <a href="https://projects.propublica.org/nonprofits/organizations/71162666">https://projects.propublica.org/nonprofits/organizations/71162666</a> <a href="https://www.montpelier.org/about-us/">https://www.montpelier.org/about-us/</a>	<a href="https://projects.propublica.org/nonprofits/organizations/71162666">https://projects.propublica.org/nonprofits/organizations/71162666</a> <a href="https://www.montpelier.org/about-us/">https://www.montpelier.org/about-us/</a>
	Mount Vernon	Mount Vernon Ladies Association of the Union	Mount Vernon, VA	500 acres	1 million	1734	\$62.3M	\$50.6M	\$11.7M	Contributions: \$30M Program Services: \$17M Investment Income: \$7.9M Net Inventory Sales: \$10.2M	\$30M	\$27.8M	n/a	Grounds Pass: \$28 adults, \$15 youth, children free Mansion Tour: \$2 additional Museum Tour: \$2 additional Venue Rentals: (Dawn, Inn, VC) Garden Tour: \$5 plus admission Private evening Tours: \$2,500-\$8,500 Character Dinner: \$750 George Washington Symposium: \$250 Holiday Train: \$70	Annual Revenue (2023): \$2,138,679 Single: \$75 Family: \$220 Patron: \$250-\$500 Regents Circle: \$1-\$25,000		Mount Vernon tends demonstration crops including tobacco, wheat, hemp, flax, potatoes, and vegetables	Y	at least 577 enslaved people lived and worked at Mount Vernon during George Washington's lifetime <a href="https://projects.propublica.org/nonprofits/organizations/540564701">https://projects.propublica.org/nonprofits/organizations/540564701</a> <a href="https://www.mountvernon.org/about">https://www.mountvernon.org/about</a>	<a href="https://projects.propublica.org/nonprofits/organizations/540564701">https://projects.propublica.org/nonprofits/organizations/540564701</a> <a href="https://www.mountvernon.org/about">https://www.mountvernon.org/about</a>
En/Commercial	River Farm	American Horticultural Society	Alexandria, VA	25 acres		1757	\$209K	\$516K	(\$313K)	Site rentals Yoga classes Spring Garden market		\$202,832	n/a	Free Entry and Parking Wedding Venue: \$4,500 to \$18,900 Garden Rentals: \$1,000-\$3,500 Memorial Rentals: \$1,500-\$7,000 Meeting & Retreats: \$1,000-\$2,500 Photography Session: \$150-\$250/two hours Artist Rental Fee: \$61/day	AHS membership: Senior: \$35.00 Individual: \$50.00 Dual/Family: \$70.00 Contributing: \$100.00 Benefactor: \$250.00 Patron: \$500.00 President's Council: \$1000		Spring Garden Market	Y	There were fifty-seven enslaved people living at River Farm in 1790, of whom twenty-seven were owned by George Washington. <a href="https://projects.propublica.org/nonprofits/organizations/730726498/2020-21-2021-22/2020-21-2021-22">https://projects.propublica.org/nonprofits/organizations/730726498/2020-21-2021-22/2020-21-2021-22</a> <a href="https://ahs.org/river-farm/">https://ahs.org/river-farm/</a> <a href="https://www.mountvernon.org/libraries/digital-library/collections/river-farm">https://www.mountvernon.org/libraries/digital-library/collections/river-farm</a>	<a href="https://projects.propublica.org/nonprofits/organizations/730726498/2020-21-2021-22/2020-21-2021-22">https://projects.propublica.org/nonprofits/organizations/730726498/2020-21-2021-22/2020-21-2021-22</a> <a href="https://ahs.org/river-farm/">https://ahs.org/river-farm/</a> <a href="https://www.mountvernon.org/libraries/digital-library/collections/river-farm">https://www.mountvernon.org/libraries/digital-library/collections/river-farm</a>
	Shelburne Farms	Shelburne Farms	Shelburne, VT	1,400 acres	Over 140,000	late 18th century	\$10M	\$7.58M	\$2.46M	Contributions Program Services: \$957,784 Investment Income: \$1,071,749 Sales of Assets: \$141,925	\$7,873,544	\$957K	Shelburne Farm Inn: \$185 to \$1,210/night	Free admission Plant, bird, and orienteering walks: \$5 Abenaki Campfire: \$5 Educator Course: \$0-\$2,000 School Programs: \$4-\$6/student Preschool Program: \$375-\$395/season Summer Camp: \$225-\$900/week	none listed \$45 Individual \$60 Dual \$75 Family \$100 Donor \$250 Sponsor \$500 Patron \$1,000 Steward \$2,500 Cultivator \$5,000 Benefactor		Property largely for educational agricultural use. Evidence of some residential leases (not agricultural).		<a href="https://projects.propublica.org/nonprofits/organizations/30229347">https://projects.propublica.org/nonprofits/organizations/30229347</a> <a href="https://shelburnefarms.org/">https://shelburnefarms.org/</a> <a href="https://www.angelfire.com/pnw/stone/shelburne-farms">https://www.angelfire.com/pnw/stone/shelburne-farms</a>	<a href="https://projects.propublica.org/nonprofits/organizations/30229347">https://projects.propublica.org/nonprofits/organizations/30229347</a> <a href="https://shelburnefarms.org/">https://shelburnefarms.org/</a> <a href="https://www.angelfire.com/pnw/stone/shelburne-farms">https://www.angelfire.com/pnw/stone/shelburne-farms</a>
	Blandy Experimental Farm State Arboretum of Virginia	University of Virginia, Supported by Friends of the University of Virginia, Blandy Experimental Farms	Royce, VA	712 acres	Over 150,000	Farm formed: 1928 Opened to public: 1982	\$2.46M	\$2.58M	(\$12K)	Endowment FOSA Support State Appropriation UVA Support Friends of group also offers public programs including arboretum tours, lectures, workshops, and exhibits	\$211,647 (Friends of)	\$22K (Friends of)	Facilities rental available to partner organizations only: Library: \$100/day Dining Room: \$50/day Kitchen: \$50/day Classroom: \$100/day Patron: \$50/day Amphitheater: \$50/day VIP Apartment: \$10 per adult/night Research Village: \$12/person/night Stone Cottage: \$12/person/night Farmhouse: \$150/night	Charter Tour: \$5 per person Bottle Trail: \$5 adult/ \$2 child Grounds free of charge	FOSA Annual Revenue (2023): \$25,412 Through FOSA: Individual: \$45 Family: \$75 Family \$5+ \$50 Nonprofit: \$65 Perennial: \$120+ Patron: \$250-499 Benefactor: \$500-999 Student Membership: \$25 Dog Membership: \$25	Friends of the State Arboretum	A portion of the site was formerly used for commercial farming	Y	Property was once the Tuleyries estate, which enslaved more than 73 people. The east wing of the Quarters building was housing for the enslaved. A cemetery for enslaved people is on the property with at least 40 unmarked <a href="https://blandy.virginia.edu/sites/blandy.virginia.edu/files/FOSAAnnualReportFY20202019Final.pdf">https://blandy.virginia.edu/sites/blandy.virginia.edu/files/FOSAAnnualReportFY20202019Final.pdf</a> <a href="https://blandy.virginia.edu/">https://blandy.virginia.edu/</a> <a href="https://blandy.virginia.edu/facilities-reservations">https://blandy.virginia.edu/facilities-reservations</a>	<a href="https://blandy.virginia.edu/sites/blandy.virginia.edu/files/FOSAAnnualReportFY20202019Final.pdf">https://blandy.virginia.edu/sites/blandy.virginia.edu/files/FOSAAnnualReportFY20202019Final.pdf</a> <a href="https://blandy.virginia.edu/">https://blandy.virginia.edu/</a> <a href="https://blandy.virginia.edu/facilities-reservations">https://blandy.virginia.edu/facilities-reservations</a>

Note the sites and figures presented below reflect a cursory analysis of comparable sites across a broad cross section of public and private entities, affording observable trends, opportunities and challenges in the consideration of funding and operational models for a future Oak Hill State Park.  
Updated 3/1/2025

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# APPENDIX F – POTENTIAL FUNDING STREAMS

## REVENUE POTENTIAL

### F1. Oak Hill Potential Funding Streams Narrative Summary:

Oak Hill State Park will require robust revenue streams to ensure successful long-term operations and the ability to offer visitor programming that realizes the tremendous potential of the site. As shown in the Executive Summary, the study team’s recommended funding model includes earned revenue from visitor use activities, contributed revenue from private philanthropy, memberships, sponsorships and grants, and yearly earnings revenue from the initial \$20M endowment that is projected to grow over time. These diversified revenue streams align with best practices at both state and national parks.

#### F1.1 Earned Revenue Potential

Oak Hill already generates significant income for its current owners through rental operations that are expected to continue, and as a state park there may be significant potential for earned revenue from its anticipated visitor and recreational experiences across its scenic, natural, and cultural landscapes. With Virginia State Parks’ demonstrated track record for managing park facilities and recreational activities, the study team anticipates 6-7 figure annual earned revenues for Oak Hill when it fully opens to the public. *(Refer to Figure 2: Oak Hill State Park Funding Model on page 10 and Figure 4: Revenue Projections on Page 12 of the Executive Summary for more information.)*

- Rental revenues – The funding model anticipates rental revenue from:
  - Farmland leases - \$50k annually beginning in Year 2, based on a projection of \$50 per acre leased per year.
  - Tenant houses – An initial estimate of \$360k in Year 2, based on comparable regional overnight stay costs for accommodations and vacation rentals, with projections steadily increasing with market rates over time.
  - Event rentals – A conservative projection of limited event rentals for the garden and grounds beginning in Year 4 yields \$10k-15k annually, this projection will grow as the park development master plan articulates future venue options. Loudoun area comparables suggest event revenues may grow significantly, with event rental fees (facility only) often exceeding \$15-20K per event (Source Visit Loudoun).
- Admissions and fees – Gate revenues and program service fees are anticipated to grow steadily in Years 1 – 5 as more and more Oak Hill experiences come online for the public. These include:
  - Parking fees (non-historic core) – As one of Oak Hill’s earliest actionable revenue streams during establishment, projected day-use parking fees are based on an estimate of a \$10 per car fee, with an expected 100,000 cars by Year 5. Each car is conservatively estimated to include 2.5 visitors per car on average. Parking fees based on a lower number of visitors per car would therefore generate more vehicle trips and increasing corresponding



revenues. Corresponding visitation, at 2.5 persons per car, equates to 250,000 visitors annually by Year 5, based on Northern Virginia DCR comparables.

- Ticketed admissions to Historic Core – Access to Oak Hill’s historic core will expand over time during Years 1-5, beginning with guided and special event tours, and progressing to daily, ticketed public access. Admission to the historic core anticipates revenues for increasing levels of access beginning in Year 3, including tours of the Manor House and the gardens/grounds as well as special educational programs and events. Estimates are based on \$15 admission fees to the historic core that are in addition to day-use parking fees. The projected level of engagement would begin in Year 3 and rise to 25,000 visitors annually by Year 5.
- Merchandise / retail – The model anticipates merchandise and retail operations coming online by Year 4, with an initial estimate of \$50,000 annual revenue that increases year over year. This is based on comparable retail revenues from other DCR sites.

### F1.2. Contributed Revenue Potential

Contributed revenue will be essential to ensuring Oak Hill’s long-term financial sustainability. **The study team conducted research and analysis to conclude there is significant potential for philanthropic support of Oak Hill State Park to meet ongoing priority and programmatic needs.** The team recommends a detailed long-term philanthropic plan for Oak Hill in conjunction with the Park’s future master plan. This section outlines recommendations based on an initial assessment of philanthropic opportunities and challenges to establish and launch the new state park in its first 5 -10 years.

### F1.3. Recommendations for a Support Organization - “Friends of Oak Hill”

A critical early step for the Commonwealth is to determine the appropriate support organization structure to manage Oak Hill’s philanthropy activities on a permanent basis. Initial fundraising for the acquisition and creation of Oak Hill State Park is led by The Conservation Fund (TCF), who intends to remain engaged as an interim partner for the first few years of the park to help steward the site and incubate a long-term philanthropic organization. **The study team recommends that the Commonwealth and key stakeholders establish a new 501c3 nonprofit organization – a “Friends Group” - to serve as the official Citizen Support Organization (“CSO”) for Oak Hill.**

#### Key needs for a support organization

To ensure Oak Hill’s financial sustainability, the Commonwealth will need a long-term partner to conduct ongoing philanthropic activities for the park. TCF, as an early philanthropic partner, is establishing the endowment to generate annual operating income in support of Oak Hill State Park. A management structure, i.e. a Board representing partner and community interests, will be needed to govern the management and spending of investment income for the park’s benefit. A partner organization could also provide additional flexibility to engage in diversified fundraising strategies as well as any of the anticipated earned revenue streams (i.e. venue rentals, cabin rentals, program service revenue, retail, etc.) at Oak Hill. An official 501c3 nonprofit partner could meet these needs, provided that the 501c3 remains in lockstep with DCR and the Park Manager on priorities and plans.

*Considerations in planning for a new support organization*

The Commonwealth and initial stakeholders (TCF and/or other early partners) may consider executing a CSO development plan that accounts each party's contributions and the timeline anticipated to establish and stand up a new 501c3 organization dedicated to Oak Hill State Park. This should include a process to identify and engage advocates and supporters who can serve as early leadership for the new organization as well as a donor communications plan to ensure Oak Hill's early supporters remain engaged with the park through its new philanthropic partner.

*Recommendations*

The proposed new friends group may be established in accordance with the Commonwealth's official policies and guidelines for Citizen Support Organizations, as outlined in the [Volunteer Citizen Support Organization Manual](#), to ensure its purpose is aligned with the needs and plans of the Park. The Articles of Incorporation and Bylaws of the new friends group may clearly state that its purpose is to support Oak Hill State Park.

Since the proposed friends group for Oak Hill would take on a significant philanthropic role once established, the Commonwealth may decide to take steps to ensure long-term partnership alignment, following industry best practices (see resources below.) These steps, taken with the advice of appropriate counsel, may include:

- Philanthropic Partnership Agreement - The Commonwealth could establish a comprehensive agreement with the Oak Hill Friends Group that authorizes the organization to fundraise on the park's behalf in accordance with mutually agreed upon guidelines to ensure alignment with DCR policies and priorities. Per the National Park Service model, this agreement could be for a duration of five to twenty years and renewable. Guidelines outlined in the agreement may include (but are not limited to):
  - delineation of roles and responsibilities between Park personnel and the friends group around philanthropic activities, including articulating the authority for donor solicitation, communication, and reviews and approvals thereof;
  - outlining friends group access to the park site and assets for fundraising purposes;
  - a process for vetting potential donors for alignment and to avoid conflicts of interest;
  - establishment of an approved donor recognition plan and procedures for philanthropic communications;
  - guidelines for accepting and managing budget-relieving in-kind/pro bono contributions;
  - corporate partnership policies regarding potential sponsorship, cause marketing, and licensing opportunities; and,
  - guidelines around friends group advocacy activities, if applicable.
- Annual Work Plan - The Park Manager and friends group may agree to develop an Annual Work Plan that aligns with the Park's priorities and needs. This Work Plan may include proposed fundraising strategies and activities, including priority projects and programs, donor cultivation activities, methods for engaging donors (i.e. donation boxes, QR codes, checkout donations, etc.) and more. This plan could be signed by the Park Manager and the friends group representative each year.

*For further study & planning*

A new organization should have its own operating expenses that may have to be offset by additional fundraising and/or earned revenue. These expenses should scale based on

determination of the support organization's priority activities and lines of business, including whether the partner would be solely focused on fundraising or if it is also charged with managing community programs, visitor use activities, rentals, retail, etc. The study team recommends further analysis of the potential operating needs of a new philanthropic partner based on these determinations.

A "brand development study" should be considered as an early consideration of establishing the friends group. This could include a competitive market study, creative development of brand assets, securing relevant domains and handles, and content and communications planning.

*Additional resources for reference:*

- National Park Service [Director's Order 21: Donations and Philanthropic Partnerships](#)
- National Park Service Director's Order 21 [Reference Manual Chapter 6: Philanthropic Partnership Agreements](#)
- National Park Service [Making Friends: An Introduction to Building National Park Service Friends Groups](#)
- National Park Service [Sample Annual Philanthropic Work Plan](#) (downloadable .xls template)
- National Parks Conservation Association Center for Park Management [Best Practices in Friends Groups and National Parks](#)
- United States Fish & Wildlife Service [Friends Partnerships](#)
- National Park Foundation / Redstone [Park Partners Report 2024](#)

## F1.4. Opportunities & Challenges

### **F1.4.1 Philanthropic Opportunities**

A future Oak Hill State Park is well positioned for long-term philanthropic support in several ways:

- Location - Loudoun County, Virginia is home to a highly philanthropic community, with the [highest median household income](#) in the U.S. since 2007. Loudoun also has a strong and growing corporate sector, with [key industries](#) including data centers, information and communications technology, federal government contracting, aerospace and defense, aviation and transportation, health innovation and technology, and agriculture and related businesses. The region has high rates of philanthropic giving, as a recent [WalletHub study](#) ranked Virginia as the 3rd in the nation for charitable giving, and [SmartAsset](#) ranked Loudoun County as the 2nd most generous in Virginia.
- Market Interest - The Commonwealth is home to a robust history and cultural heritage economy, including in Loudoun County itself. As noted in **Appendix E: Comparative Analysis**, Virginia sustains several Presidential homes as well as historic sites that focus on Colonial and Early American periods. Loudoun County features local history museums as well as sites dedicated to agricultural and sporting history, all supported in part through philanthropic contributions. The longevity of these institutions demonstrates local interest in supporting historic sites similar to Oak Hill as important cultural assets in the region.
- Local enthusiasm - Anecdotally, the study team has found initial enthusiasm in the local community for the conservation of Oak Hill as a new state park, rather than opening the property



up to development. This enthusiasm indicates a likely pool of potential early donors to support development of the park and its programs.

- **Timing** - The anticipated establishment of Oak Hill in 2025 aligns with the nation's preparations for marking the US Semiquincentennial in 2026. This landmark 250th anniversary will provide new funding opportunities and added visibility for Oak Hill as the home of a Founding Father, which may help gain significant media and donor attention for the site.
- **Initial Partner** - The Commonwealth has an established organization serving as an interim philanthropic partner in The Conservation Fund. TCF is a well-respected organization with demonstrated success in raising funds both in Virginia and nationwide. TCF also has the internal infrastructure, including prospect research, event planning, executive-level relationships, and communications capabilities, to manage and execute initial fundraising strategies pursuing individual, corporate, foundation, and grant support. This collaboration is essential to the acquisition and potential creation of Oak Hill State Park, as outlined further below.

#### **F1.4.2 Philanthropic Challenges**

However, potential challenges to philanthropic success worth considering include:

- **Macroeconomic Trends** - Philanthropy is subject to external pressures in the economy, including tax policy, inflation, and consumer confidence. Per [Giving USA 2024](#), total giving increased in 2023 but it did not keep pace with the rate of inflation. Nonprofits must monitor these trends and adapt their philanthropy strategies and projected revenues accordingly.
- **Giving Priorities** - Giving priorities shift over time as donors respond to acute crises (disaster relief, public health emergencies) or increasing needs (climate mitigation, human services and humanitarian efforts). In 2023, "Arts, Culture, and Humanities" ranked 8th out of the 9 categories of nonprofit causes receiving donated funds, as measured by [Giving USA](#):

Rank	Type of Recipient Organization	Total Charitable Giving
1	Religion	\$145.81 billion
2	Human Services	\$88.84 billion
3	Education	\$87.69 billion
4	To Foundations	\$80.03 billion
5	Public-Society Benefit	\$62.81 billion
6	Health	\$56.58 billion
7	International Affairs	\$29.94 billion
8	Arts, Culture, and Humanities	\$25.26 billion
9	Environment and Animals	\$21.20 billion

The opportunity for Oak Hill is to demonstrate, within this giving landscape, ways that its programs and offerings align with several different broad philanthropic priorities, such as education, the humanities, outdoor recreation/health, and environmental conservation.

- Market Saturation - The counterpoint to the “Market Interest” opportunity is the risk that the Loudoun County / Northern Virginia region may already be saturated and unable to bear the full support of a new historic site. Leadership would do well to consider conducting a focused market analysis and donor analysis study to explore donor capacity and willingness to support a new site.
- Internal Readiness - A new friends group will need to begin its fundraising operations nearly from scratch, which means it will take time and investment to generate ongoing contributed revenue. During the incubation period, the friends group will need to build its internal infrastructure, including policies, systems, procedures, assets, and personnel. The organization will also need to collaborate with the Park Manager/team to establish fundraising priorities and budget targets. Perhaps most significantly, the friends group must build and engage a constituency of potential donors to support Oak Hill’s activities for many years to come. **The study team recommends planning for an incubation period of 12-18 months (as represented on the Funding Model – Appendix A) for the new friends group to be ready to stand on its own in support of Oak Hill.**

### F1.5 Strategic Recommendations

The fundraising strategies to support Oak Hill will evolve over time, aligned with the park acquisition and planning process. **The study team recommends a phased approach to philanthropic efforts supporting the proposed new state park:**

- Creation and Establishment Phase - As noted, TCF is serving as an initial philanthropic partner and leading efforts to raise an initial budget of \$52M to acquire the property, establish an endowment to support ongoing maintenance, and secure new equipment and improved public access. TCF anticipates the majority of this funding will come from County, State, or Federal grant sources, with approximately \$5 million from private sector sources. Conversations are underway with leading regional philanthropists and industry coalitions to secure the necessary contributions.
- Ongoing Philanthropic Strategies (Years 1 – 5) - As the new friends group commences operations, philanthropic priorities likely will expand to include investments in interpretive development, community engagement, and educational programming. **The study team assessed the recent funding landscape of comparable organizations, as shown in Section B -Audit of Potential Philanthropic Funding Sources and concluded that there are multiple potential sources of support that the friends group may pursue both for discrete project funding and repeatable annual operating support.**
- Fundraising strategies to approach these sources could include:
  - **Federal and State Grants and Programs** - The friends group could pursue government grant funding to support capital projects, outdoor recreation, educational programming, and other priorities on the Park’s behalf. Based on the current funding landscape, there could be potential grant opportunities within the Institute for Museum and Library Services, the National Endowment for the Humanities, the National Park Service, and the Virginia DHR.

- **Private Philanthropy – Individuals and private foundations likely represent Oak Hill’s best opportunities for long-term philanthropic support.**
  - High Net Worth Individuals: Contributed revenues in Years 1-2, should focus on direct engagement with local philanthropists and potential supporters through robust outreach, communications, and personal cultivation strategies. This engagement may include personal site tours and “behind the scenes” events as well as development of a robust case for support that outlines the vision for Oak Hill and its benefits to the region. Audiences of potential supporters include: Loudoun County philanthropic and business leaders; donors to comparable Virginia parks and historic sites; major supporters of other Presidential sites; donors supporting research, interpretation, and engagement with descendant communities; and donors supporting land conservation and outdoor recreation access in the region. The study team included conservative projections for individual philanthropy in the funding model, reflecting the assumption that it will take 12-18 months to launch a friends group and articulate a case for support that aligns with the park master plan; however, this is an area that could grow significantly as lead donors are identified.
  - Membership: The friends group should conduct more focused analysis and planning to determine if an individual membership program would advance its financial, donor acquisition, and donor stewardship goals. The study team’s initial funding model does include a membership program as part of its contributed revenue projections. Comparable data on membership ranges from roughly \$32,000 (Gunston Hall) to over \$2 million (Mount Vernon) in annual membership revenue, depending on the longevity of the program, audience reach, and robust benefit offerings.
  - Private Foundations: There are many private foundations at both the regional and national levels with giving priorities that align with Oak Hill’s anticipated activities, including historic preservation, education, environmental conservation, and community engagement. The funding model includes a conservative projection of \$250,000 a year in grant funding in Years 2-5, reflecting both private foundation and government sources. A representative listing of potential private foundation opportunities is included in the next section, *Section B - Audit of Potential Philanthropic Funding Sources*.
- **Corporate Philanthropy & Strategic Partnerships** – Oak Hill also could have strong appeal for corporate sector support through philanthropic grants, sponsorship, cause marketing, and in-kind contributions. Leadership may identify and pursue specific partnership opportunities as the Park’s master plan, programming, and community engagement activities are determined. The study team recommends further study of the market landscape and customizable partnership opportunities at Oak Hill to determine the park’s unique positioning and value proposition for the corporate sector. Initial corporate partnership strategies could include: a regional business approach to major employers in Northern VA seeking employee engagement opportunities at the Park; outreach to the outdoor industry to support and promote the Park’s recreational activities; partnerships within the tourism industry to attract new visitors; and commercial licensing opportunities tied to any unique and distinctive home decor, furnishings, or other features at Oak Hill. A representative listing of potential corporate partners is included in the next section, *B Audit of Potential Philanthropic Funding Sources*.



### F1.6 Potential Support Organization Revenues

Friends groups provide meaningful support to their partner parks and the scale and types of support vary depending on the operating model and the lines of business they manage. This can be direct support, with the friends group making specific financial contributions to park projects or priority needs. Friends groups may also provide indirect support by managing areas of operations on the park's behalf, offsetting park operating expenses, and investing proceeds in ongoing visitor access, community engagement.

The chart below illustrates a sampling of publicly available revenue data for 501c3 organizations managing comparable historic sites/museums chosen for their similar subject matter and operating models. As shown, each of these organizations generate a mix of earned revenue from admissions, retail, rentals, etc. and contributed revenue from individuals, events, corporate partnerships, and/or grants.

501c3 Comps	Earned Revenue & Sources					Contributed Revenue & Sources				
Sample SOs	2023 Earned Revenue	Admissions	Retail	Venue / Facility Rentals	Other Earned Rev	2023 Contributed Revenue	Membership / Individuals	Fundraising Events	Corporate Partnerships	Grants
Oatlands, Inc	\$462K	✓	✓	✓	✓	\$648,688	✓			✓
Board of Regents of Gunston Hall	\$168K	✓	✓	✓	✓	\$767,499		✓		
James K. Polk Memorial Association	\$137K	✓	✓	✓	✓	\$157,600	✓	✓		✓
TR Inaugural Site Foundation	\$126K	✓	✓	✓	✓	\$719,886	✓	✓		✓
George C. Marshall International Center	\$274K	✓	✓	✓	✓	\$571,578	✓	✓	✓	

Based on this comparable 501c3 data, the audit of a wealth of potential philanthropic funding sources presented in section F2 below, and confirmed by the broader analysis presented in Appendix G, the study team anticipates:

1. **A 501c3 partnering with Virginia State Parks** (with on-site management and diverse recreational experiences beyond a historic core building or museum) **could together generate considerably higher earned revenues** once established, when compared to smaller individual sites, whose core focus is cultural resource experience.
2. A friends group for Oak Hill State Park (inclusive of additional grant revenues that may be sought by DCR/Virginia State Parks), **could reasonably target raising nearly \$600,000 of contributed revenues annually by Year five (5) to support park priorities (See Figure 2 of the Executive Summary)**. As the friends group increases its capacity and deepens

relationships with potential donors/funders, that fundraising target would increase and can encompass both annual operating support and restricted capital project or program support as needed to support park needs and meet its own operating budget.

## F2. Audit of Potential Philanthropic Funding Sources:

Methodology: A survey of potential institutional funders identified through analysis of comparable historic, cultural, or environmental nonprofits operating in Virginia as well as likely regional or national funders. This list includes potential funders with a presence or demonstrated support in Virginia as well as stated or demonstrated giving priorities that align with a potential Oak Hill State Park.

Potential Funding Source	Type of Funder	Location	Relevant Giving Priorities (If available)					Recent Comparable Grantees (If applicable)							
			History & Culture	Education	Outdoor Recreation	Conservation	Community Engagement	American Battlefield Trust	C & O Canal Trust	Colonial Williamsburg	Jamestown Yorktown Fdtn	Mount Vernon	Monticello	National Sporting Library &	Shen National Park Trust
Alliance Bernstein	Corp	Global, DC office		X			X		X						
Altria Group	Corp	VA HQ				X	X								X
Amazon	Corp	Global, VA presence				X		X							
American Electric Power Fdtn	Corp	Natl, VA presence	X	X		X									X
Ancestry	Corp	Global	X	X				X							
Bank of America	Corp	Natl, VA presence	X			X		X	X						
Bass Pro Shops and Cabela's Outdoor Fund	Corp	Natl, VA presence			X	X			X						X
Boeing	Corp	Global, VA presence		X			X					X			X

Potential Funding Source (Continued)	Type of Funder (Continued)	Location (Continued)	History & Culture	Education	Outdoor Recreation	Conservation	Community Engagement	American Battlefield Trust	C & O Canal Trust	Colonial Williamsburg	Jamestown Yorktown Fdtn	Mount Vernon	Monticello	National Sporting Library & Museum	Shen National Park Trust	VA 250
Booz Allen Hamilton	Corp	Global, VA HQ		X											X	
Brown Advisory	Corp	Global, VA presence		X		X								X		
Canon	Corp	Global, VA presence		X		X	X			X						
Chubb	Corp	Global		X		X						X				
Clark Construction Group, LLC	Corp	National, MD HQ				X			X					X		
CloudHQ	Corp	Global, VA presence														
Coca-Cola Company	Corp	Global	X			X				X						
Colonial Webb Contractors	Corp	VA					X			X						
CoStar Group	Corp	Global, VA HQ		X		X	X									X
Crescent Hotels and Resorts LLC	Corp	National, VA presence		X		X	X			X						
CSX	Corp	Regional, VA presence					X		X							



Potential Funding Source (Continued)	Type of Funder (Continued)	Location (Continued)	History & Culture	Education	Outdoor Recreation	Conservation	Community Engagement	American Battlefield Trust	C & O Canal Trust	Colonial Williamsburg	Jamestown Yorktown Fdtn	Mount Vernon	Monticello	National Sporting Library & Museum	Shen National Park Trust	VA 250
CyrusOne	Corp	Global, VA presence		X			X									
Data Center Coalition	Corp	VA					X									
Deloitte	Corp	Global, VA presence	X	X		X			X							
Dominion Energy	Corp	VA		X		X	X				X					X
Dr. Scholl Fdtn	Corp	National	X	X		X									X	
Enspire Energy	Corp	VA	X			X				X						
Enterprise Holdings	Corp	Global				X	X			X						
ESRI	Corp	Global	X	X				X								
Expedia	Corp	Global				X		X								
Ford	Corp	Global					X					X				
Google	Corp	Global		X		X	X	X								

Potential Funding Source (Continued)	Type of Funder (Continued)	Location (Continued)	History & Culture	Education	Outdoor Recreation	Conservation	Community Engagement	American Battlefield Trust	C & O Canal Trust	Colonial Williamsburg	Jamestown Yorktown Fdtn	Mount Vernon	Monticello	National Sporting Library & Museum	Shen National Park Trust	VA 250
History Channel / A+E	Corp	National	X	X				X								
Home Depot	Corp	Global							X							
Hunton Andrews Kurth	Corp	Global, VA presence								X						
Investment Research Partners	Corp	PA				X									X	
Kaufman & Canoles	Corp	Multiple offices in VA								X						
KPMG	Corp	Global, VA presence		X					X						X	
Lockheed Martin	Corp	Global, VA presence					X	X								
M&T Bank	Corp	Regional, VA presence							X							
Mars / Mars Fdtn	Corp	Global, VA HQ	X			X	X	X	X			X		X		
Microsoft	Corp	Global, VA presence		X		X	X	X								
Middleburg Communities	Corp	VA					X							X		

Potential Funding Source (Continued)	Type of Funder (Continued)	Location (Continued)	History & Culture	Education	Outdoor Recreation	Conservation	Community Engagement	American Battlefield Trust	C & O Canal Trust	Colonial Williamsburg	Jamestown Yorktown Fdtn	Mount Vernon	Monticello	National Sporting Library & Museum	Shen National Park Trust	VA 250
Minkoff Development	Corp	Regional, VA presence							X							
Mutual Assurance Society of Virginia Fund	Corp	VA	X	X						X						
NetJets	Corp	Global, VA presence		X		X	X							X		
Norfolk Southern	Corp	Regional, VA presence				X	X	X								
Northrup Grumman	Corp	Global, VA HQ				X									X	
Orvis	Corp	National, VA presence			X	X									X	
Prudential	Corp	Global, VA presence	X	X				X								
Red Five Security	Corp	VA		X		X			X							
REI Cooperative	Corp	National, VA presence			X	X	X		X						X	
S&P Global	Corp	Global, VA presence				X									X	
Salamander Resort	Corp	VA											X			



Potential Funding Source (Continued)	Type of Funder (Continued)	Location (Continued)	History & Culture	Education	Outdoor Recreation	Conservation	Community Engagement	American Battlefield Trust	C & O Canal Trust	Colonial Williamsburg	Jamestown Yorktown Fdtn	Mount Vernon	Monticello	National Sporting Library & Museum	Shen National Park Trust	VA 250
Salesforce	Corp	Global, VA presence		X		X			X							
Sentara	Corp	Regional, VA HQ			X		X			X					X	X
Sheetz, Inc.	Corp	Regional, VA presence	X	X		X	X		X							
Stack Infrastructure	Corp	Global, VA presence														
State Farm	Corp	National, VA presence		X			X	X								
Strategic Investment Group	Corp	VA								X						
TCV Trust and Wealth Management	Corp	VA	X							X	X					
Thrivent	Corp	National, VA presence													X	
Truist	Corp	Regional, VA presence											X			
Verizon	Corp	National, VA presence				X		X								
Virginia Tourism Corp	Corp	VA														

Potential Funding Source (Continued)	Type of Funder (Continued)	Location (Continued)	History & Culture	Education	Outdoor Recreation	Conservation	Community Engagement	American Battlefield Trust	C & O Canal Trust	Colonial Williamsburg	Jamestown Yorktown Fdtn	Mount Vernon	Monticello	National Sporting Library & Museum	Shen National Park Trust	VA 250
Walmart	Corp	Global				X			X							
Washington Fine Properties	Corp	Regional, NoVa offices												X		
Wegmans	Corp	Regional, VA presence		X											X	
Andrew W. Mellon Foundation	Fdtn	NYC	X	X									X			
Butz Foundation	Fdtn	MD	X	X					X							
Cabell Foundation	Fdtn	VA	X	X	X	X	X									X
Carnegie Corp of New York	Fdtn	Global, Based in NYC		X			X									
Dao Feng & Angela Foundation	Fdtn	VA	X			X			X							
Gilliam Family Foundation	Fdtn	SW VA	X	X		X										X
Greater Washington Community Foundation	Fdtn	DC							X							
HTR Foundation, Inc.	Fdtn	FL	X					X								

Potential Funding Source (Continued)	Type of Funder (Continued)	Location (Continued)	History & Culture	Education	Outdoor Recreation	Conservation	Community Engagement	American Battlefield Trust	C & O Canal Trust	Colonial Williamsburg	Jamestown Yorktown Fdtn	Mount Vernon	Monticello	National Sporting Library & Museum	Shen National Park Trust	VA 250
J. Willard and Alice S. Marriott Foundation	Fdtn	MD		X					X							
Lee-Jackson Educational Foundation	Fdtn	VA	X	X				X								
Mary Morton Parsons Foundation	Fdtn	VA														X
Richard S. Reynolds Foundation	Fdtn	VA		X		X					X					X
Virginia Humanities	Fdtn	VA	X													
Virginia Outdoors Foundation	Fdtn	VA				X										
Volgenau Foundation	Fdtn	VA	X	X		X		X								
Institute of Museum & Library Services	Govt	National	X	X			X			X			X			
National Endowment for the Humanities	Govt	National	X	X			X			X			X			
National Park Service	Govt	National	X	X	X	X	X									
National Park Service Semiquincentennial Grant Program	Govt	National	X													



Potential Funding Source (Continued)	Type of Funder (Continued)	Location (Continued)	History & Culture	Education	Outdoor Recreation	Conservation	Community Engagement	American Battlefield Trust	C & O Canal Trust	Colonial Williamsburg	Jamestown Yorktown Fdtn	Mount Vernon	Monticello	National Sporting Library & Museum	Shen National Park Trust	VA 250
Save America's Treasures grants	Govt	National	X										X			
Virginia Department of Historic Resources	Govt	VA	X													

END

# APPENDIX G: ENGAGEMENT

The study team advises enlisting a broad coalition of individuals and groups during the future park's establishment. Advancing these relationships through thoughtful outreach will support many aspects of acquisition, development, and park operations. Engagement is equally important to developing financial resources and the friends group necessary to support programming and development. We recommend beginning this outreach as early as possible—even before embarking on formal master planning process.

## PARTNER AND STAKEHOLDER OUTREACH

The Virginia Department of Conservation and Recreation (DCR) already has two existing and vested partners making significant contributions to a future Oak Hill State Park; The Conservation Fund (TCF), and the Loudoun County government. While responding to the legislative charge to assess the involvement and contribution of Loudoun County, this analysis also identifies existing partners, communities rooted in Oak Hill's land and history, and extended community stakeholders who may contribute to the park's origination and long-term success.

### A. Existing Partners

**Department of Conservation and Recreation – Division of State Parks.** The Virginia Legislature tasked DCR to conduct this study to assess the challenges and opportunities accompanying the potential acquisition and development of Oak Hill as a state park. DCR's Division of State Parks, was created by the General Assembly and charged with "the acquisition, preservation, development and maintenance of areas, properties, land or estates of scenic beauty, recreational utility, historical interest, remarkable phenomena, or other unusual features. Such acquisitions and development are declared to be used for the use, observation, education, health, and pleasure of the people" (Acts of the Assembly, 1926). As the state's lead natural resource conservation agency, DCR's long track record of successful public park management and stewardship applied to Oak Hill's resources would fulfill State Park's founding ideals and indispensably serve this resource and the general public. While DCR may become the future steward of Oak Hill, there is significant partner support in TCF, Loudoun County, and the DeLashmutt family (current owners), each presently engaged and supportive of a future Oak Hill State Park.

**The Conservation Fund.** TCF is playing a key role at Oak Hill. A trusted partner to DCR, TCF has a strong history supporting the development of other State Park projects, including at the natural and culturally significant Machicomoco State Park. Nurturing a trusted relationship with Oak Hill's current owners, Loudoun County, and DCR, TCF's involvement and contributions include at least:

- Negotiated the \$22M grant agreement with Loudoun County.
- Serves as liaison to the landowners, negotiating sale agreement, and related conveyances.
- Negotiating the proposed phased transfer of the property to the Commonwealth.
- Overseeing stream and wetland mitigation, transitioning tenant and agricultural leases, and developing limited, low-impact public access to segments of the park.
- Raising a \$20M endowment to support ongoing maintenance.
- Contributing to the early development of the "Friends of Oak Hill" in collaboration with DCR.
- Ongoing involvement following the potential future transfer of lands to the Commonwealth.

TCF's ongoing partnership is essential to the acquisition, initial activation, and successful stewardship and transfer of Oak Hill from private property to public resource.

**Loudoun County.** Loudoun County has already translated their long-held interest in preserving and opening Oak Hill as a public resource by approving the \$22M grant to TCF to acquire the property for purposes of a state park. Initial discussions with County staff, and leadership with Visit Loudoun, confirm both interest and opportunity. The following considerations for the County's continued involvement should be further explored, including interests to:

- Support Oak Hill's establishment as a State Park retaining as much open space as possible through carefully designed recreational development and the retention of agricultural lands.<sup>i</sup>
- Support Oak Hill's conservation, and activation as a State Park uniquely situated as a buffer against encroaching development from the east, and a common ground for residents and visitors from both east and west Loudoun County.
- Connect Oak Hill to its adjacent historic sites and town centers by greenways, from Aldie to Oatlands, and points north.
- Expand the experiences and offerings of its already robust tourism economy<sup>ii</sup> through partnerships with Visit Loudoun, ([VisitLoudoun.org](https://www.visitloudoun.org)) the county's public/private partnership destination marketing organization.
- Expand initiatives to tell Loudoun's many histories through Oak Hill, including a fuller understanding of enslavement and segregation as an integral part of its story.
- Leverage the remarkable agricultural history preserved at Oak Hill, and its ongoing contributions to the local agricultural economy.
- Promote visitation to Oak Hill from its growing population and conservation of this intact rural environment as a complement to the county's ongoing residential and economic development.

Loudoun County's vested interest in the Oak Hill State Park opportunity, demonstrated through its acquisition grant, clearly expresses its long-held interest to see these lands preserved and made accessible to the public. As an active partner to DCR as the potential park develops there exist many opportunities to explore means through which Loudoun County may physically and programmatically make connections, and lend resources to Oak Hill's recreational and heritage tourism offerings.

**The DeLashmutt Family.** For 70 years, the DeLashmutt family's stewardship of Oak Hill as a private home has required careful management and protection of its rural character and integrity amidst rapidly developing surroundings. Their vision to preserve the property and open it to the public leaves a lasting legacy. It is not surprising then, as they considered options for transferring their stewardship responsibilities to others, that the family turned to TCF, and by association, the Commonwealth and Loudoun County as institutions that see Oak Hill as a public trust.

## **B. Communities Rooted in Oak Hill's Land and History**

Oak Hill includes other historically significant stakeholders – each with rich ties to the property—whose voices may inform a deeper understanding and experience of the site. Key communities include the Indigenous Descendant Community, the Enslaved Descendant Community, Oak Hill Owners Descendant Community, and Long-time Tenants and Lessees of Oak Hill. Each would be identified and thoughtfully engaged, providing DCR with better insights into the existing cultural connections to Oak Hill. This engagement will be a key tool to guide the planning, development, and impact of this resources.

**Indigenous Descendant Community.** Native Americans were the first inhabitants of Oak Hill. There is archaeological and historical evidence of people from several tribes either occupying or traversing this



land both before and after European contact. The study team recommends that DCR's experience with tribal consultation be leveraged through its early engagement and planning processes, to reach out to the descendants of these early communities. The processes listed below for engagement of other descendent communities should be duly employed, leveraging the Commonwealth's channels for outreach, as appropriate to sovereign nations with assistance from the Virginia Department of Historic Resource (DHR).

**Enslaved Descendant Community.** Identifying and engaging descendants of the enslaved at sites like Oak Hill is an imperative broadly supported by Loudoun County. The initiative may build upon existing scholarship and requires patience, openness, transparency, persistence, and sensitivity. Elsewhere such communities include familial descendants of the enslaved at a particular historic site, descendants of those enslaved throughout the surrounding region, and anyone with a cultural, intellectual, or empathetic connection to telling the stories of the enslaved at an historic site, but lacking any genealogical link.<sup>iii</sup> Local historians, descendants and interpreters associated with Highland, and the African American history community in Loudoun County have already gone a long way toward identifying and compiling the stories of the majority of the people Monroe enslaved here and some of their descendants.<sup>iv</sup> Based on the limited scope of this study on the matter, the study team understands that there are a few living descendants identified by historians, but they have not yet identified themselves publicly as part of a descendant community of the enslaved at Oak Hill. Learning about those enslaved by the Carter's and the Fairfax's at Oak Hill will require additional research. Drawing on conversations with several historians, a leader of the descendants group at Highlands, and the Chair of the Black History Committee of the Friends of the Thomas Balch Library in Leesburg,<sup>v</sup> the study team shares the following insights regarding outreach to and engagement with this broadly defined community:

- Invite and empower descendants and African American professionals to lead engagement with this community as an integral part of park development and operation.
- Reach out and listen to the voices of descendants, community leaders, and scholars.
- Facilitate and support the conduct and presentation of ongoing and new research regarding the enslaved at Oak Hill and their descendants.
- Invite, involve, and engage the descendant community in master planning and representation in "Friends of Oak Hill" organizational development.
- Give descendants agency and control over their ancestor's stories.
- Employ patience and flexibility with timelines for outreach and engagement.
- Consider how best to tell the story of the enslaved in parallel and in context with other stories at Oak Hill and nearby plantations and communities, in Virginia, across the United States, and around the world.
- Recognize and appreciate descendants for their participation, and value oral tradition.
- Recognize, and through shared programming, demonstrate that Black history is not limited to slavery.

**Oak Hill Property Owners Descendant Community.** Engaging with living descendants of the private owners of Oak Hill from the Carter's to the DeLashmutt's may potentially:

- Provide DCR with new insights into life and changes on the property under each family's stewardship as captured in family records or passed down through oral tradition.
- Reveal the existence of records, furnishings, and artifacts still in family possession that may bring new understanding to future park interpretation and programming.
- For those descendants whose ancestors enslaved people at Oak Hill, their family history may shed more light on this often poorly documented history and their engagement may present future opportunities for dialogue between the descendants of the enslaved and the enslavers at Oak Hill.

**Long-time Tenants and Lessees of Oak Hill.** The study team learned of several tenants whose residence and employment on the property stretches back decades. These people have a unique perspective on Oak Hill’s history and may also provide valuable insights regarding the maintenance and use of the property over many years, perhaps stretching back to prior generations of tenants and employees. Beyond including them in the initial stakeholder outreach, we recommend leadership consider inviting them to participate in professionally conducted oral history interviews. DCR should also connect with leadership from the Virginia Beef Corporation, Oak Hill’s long-time agricultural lessee of over 1,000 acres of agricultural lands.

### C. Extended Community Stakeholders

A representative sampling of potential community stakeholders, the following list is far from complete yet serves to illustrate the diverse assortment of stakeholders for Oak Hill State Park.

- Aldie residents, and neighbors along Tail Race Road
- Archaeological and Paleontological Communities
- Friends of Arcola Slave Quarters
- Garden Club of Virginia
- Hiking and Biking Community Leaders
- The Journey - National Heritage Area (The Journey Through Hallowed Ground)
- Leesburg town government
- Loudoun Chamber of Commerce
- Loudoun County Equine Alliance
- Loudoun Freedom Center
- Middleburg town government
- Nearby Historic Sites (Oatlands, Morven Park, Loudoun Heritage Farm Museum)
- Northern Virginia Regional Parks Authority (Stewards of nearby Aldie Mill Historic Park and Mt. Zion Historic Park)
- Other Monroe Historic Sites (James Monroe’s Highland operated by William & Mary, the James Monroe Museum and Memorial Library an administrative unit of the University of Mary Washington, and the James Monroe Birthplace Park & Museum operated by The James Monroe Memorial Foundation)
- Other Presidential Historic Sites (especially those in Virginia such as Mount Vernon, Monticello, and Montpelier)
- Other presidential retreats (Jefferson’s Poplar Forest, Lincoln’s Cottage, Theodore Roosevelt’s Pine Knot in Albemarle County, Hebert Hoover’s Rapidan River Retreat, and Camp David)
- Piedmont Environmental Council
- Piedmont Fox Hounds, and other members of the Equine and Hunt Communities
- Virginia Outdoors Foundation
- Virginia Piedmont Heritage Area Association (Long association with Oak Hill through the DeLashmutts and sponsor of previous intermittent public programming at Oak Hill)
- White House Historical Association (Presidential leader and expertise on James Hoban architect of the White House and contributor to the design and construction of Monroe’s Oak Hill manor house)

<sup>i</sup> Zoom Meeting, Deputy County Administrator Erin McLellan with study team members Glenn Stach and Brian Martin, October 25, 2024.

<sup>ii</sup> "According to the economic impact report, in 2023 tourism supported 18,213 Loudoun jobs, up almost 6.3% and resulted in \$1.1 billion in salaries and wages in the county. It generated \$147.4 million in local taxes and \$80.3 million in state taxes,

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increases of 8% and 10.6% over 2022 respectively." As reported in ["Loudoun Again Leads Virginia in Visitor Spending," Loudoun Now](#), September 16, 2024.

iii National Summit on Teaching Slavery, Convened by James Madison's Montpelier in partnership with the National Trust for Historic Preservation's African American Cultural Heritage Action Fund, [Engaging Descendant Communities in the Interpretation of Slavery at Museums and Historic Sites: A Rubric of Best Practices Established by the National Summit on Teaching Slavery](#). (v 1.0 10/19/2018)

iv Lori Hinterleiter Kimball and Wynne C. Saffer, ["The People Enslaved by President Monroe," Bulletin of Loudon County History](#), 2020-2021 Edition, 55-79. James Monroe's Highland, ["Who Was Enslaved at Highland."](#) Miranda Burnett, [Take Them In Families...](#) Emilia Stanfill, [Uncovering Their Stories: Tracing One Enslaved Community from Virginia to Louisiana.](#)

v Brian Martin conversations with Lori Kimball (11/11/24), Miranda Burnett (11/25/24), Emilia Stanfill (11/26/24), and Donna Bohanon (11/23/24).



# APPENDIX H: RECOMMENDED STUDIES & PARK DEVELOPMENT MASTER PLANNING

Oak Hill's early establishment period, Years 1-5, should prioritize the exploration of Oak Hill's abundant history and resources, while allowing for an increasing level of access to the park's natural and cultural landscape as supported by staffing and volunteer engagement. Consider that among the most exciting prospects for developing Oak Hill as a state park is its prospect to learn more about this dynamic place, its intact natural and cultural features, its people, and their many stories.

By statute, Virginia State Parks will undertake a comprehensive park development "master plan" following the property's potential transfer to the Commonwealth, and review and update the plan every ten years thereafter. As espoused in Appendix G – Engagement, the study team recommends that Oak Hill State Park's discovery and early activation period would be best leveraged through partnership, the engagement of community stakeholders, and professional studies and investigative analysis. These efforts will inform the Commonwealth's master planning efforts and enlist participation to engage and learn/share what is known and yet to be known about the property's rich history and natural resources. Listed below are several studies we recommend be completed prior to, or as a component part of park development master planning. Such studies are not uncommon in the protection and preservation of historic sites and DCR has completed similar studies and work at historic sites they currently own and maintain:

- **Early Activation Concept Design** – A brief study should be undertaken to identify where/how limited activation of parking and natural surface trails will afford access to the property within the first year of ownership. These improvements should be made at an appropriate scale, around the property's perimeter, and conducted with the lightest possible imprint on the landscape's natural, cultural, and visual resources.
- **Oral Histories** – Oral histories of current property owners and long-time tenants should be conducted and carried out to standards suitable to and with oversight from the Virginia Department of Historic Resources.
- **Cultural Landscape Report** – A Cultural Landscape Report (CLR) is the recommended standard for assessing the physical history and evolution of a property over time, confirming the integrity of its natural and cultural landscape resources, and making recommendations, based on the Secretary of Interior Standards, regarding the treatment of its spaces and individual features. This work will supplement the initial conditions assessment conducted under this Feasibility Study and work to place the understanding of existing conditions in the context of the property's broad history.
- **Historic Structures Reports** – A Historic Structures Report should be conducted for buildings across the property. This study will be helpful to determine individual and collective significance of the structures and inform decisions regarding treatment and future use. This work will supplement the initial conditions assessment conducted under this Feasibility Study and further

informed by independent conditions assessments likely to be conducted by the Virginia Department of Historic Resources, when the lands are placed in conservation.

- **Archaeological Investigations** – Archaeological studies should be planned in advance of all ground disturbing activities for improvements and stabilization property wide. The study provided as Appendix C – Archaeological Assessment Management Summary, provides an ample baseline to inform future pre-emptive and more comprehensive investigations.
- **Public Engagement** – As noted in Appendix G – Engagement, the early establishment of the park would do well to include active engagement of local and regional partners, stakeholders, and constituents. A professional outreach and engagement effort will be essential to enlist participation in and formation of the official Community Support Organization (CSO), the 501c3 entity serving as the official Friends Group for Oak Hill.
- **Fundraising and Associated Studies** – The assessment of funding opportunities presented within this feasibility study confirm the study team’s recommendations for initial development activities. We assert that the viability of the park is strong, and with proper study and management will improve upon an already generous initial offering (when considering Loudoun County’s generous grant for acquisition, TCF’s commitments, and generous endowment.) More specific market, branding, and fundraising plans may include:
  - Establishment of the Official 501c3 (CSO) including bylaws
  - Long-term Philanthropic Plan providing division of responsibilities for both state and CSO earned and contributed incomes.
  - Grant alignment (including the selection of grant opportunities provided in Appendix F)
  - CSO Membership Plans (beyond annual State Park Pass offerings)
  - Corporate Philanthropy

These and other allied planning efforts are recommended for advancement by the Commonwealth and other partners during the park’s early establishment period, to inform future visioning, park development master planning, and community engagement for years to come. The investment in these collaborative efforts will serve as a benchmark of understanding and collaboration for both near-term activation, and long-term planning for years to come.