



FINAL REPORT ON THE BRENTMOOR HOME AND THE MOSBY MUSEUM

SUBMITTED BY: THE BRENTMOOR TASK FORCE

**SUBMITTED TO: MAYOR POWELL DUGGAN AND THE
WARRENTON TOWN COUNCIL**

MARCH 8, 2016

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THE BRENTMOOR TASK FORCE
TOWN OF WARRENTON

February 26, 2016

Dear Mayor Duggan and Council Colleagues,

On behalf of the members of the Brentmoor Task Force, I am pleased to transmit the attached final report, containing the Task Force's unanimous recommendations relative to the disposition of the Mosby House (Brentmoor).

The Report contains the results of the Task Force's investigations, our analysis of the proposals put forth by the community and conclusions reached after considerable deliberation.

You will recall that the Task Force was created by our action as Council last fall, and that the members of the working group: *Ed Wright, Terry Nyhous, Bob Rust, Dave Gerrish, Mitch Oldham, Paula Johnson, Dudley Payne, Birge Watkins, Dave Goetz, Bob Dyer, and Melissa Wiedenfeld,* were chosen in part by the undersigned and in part by each of you designating a member.

When we first convened, I suggested to the Task Force members that there should be no prejudgments in the process, and that the task was to generate alternative solutions most apt to minimize town costs and risk exposure while maximizing Brentmoor's value to Warrenton.

The group worked together beautifully. While of assorted minds and opinions at the start, we became quickly a cohesive and well-synchronized cohort. The group benefited enormously from the diversity of skills and expertise assembled, and I am grateful to each of you for your selections of members.

The Task Force had commercial real estate expertise, professional property appraisal skills, architectural history and preservation practitioners, finance and legal professionals, and a number of members with both relevant historical insight as well as prior service on/institutional knowledge of earlier Brentmoor boards. *[Please read the biographies in the Appendix at **Attachment A** for full backgrounds of the team members.]* I completely endorse Judge Payne's observation that *it would be hard to find a better group for a civic task; truly.*

The Town Manager joined us constructively at every one of our meetings and site visits, which were conducted between mid-November and late January on a recurring basis, with each session typically running 2 hours and more. Attendance was strong and consistent, and on those occasions when a Task Force member could not be present physically, we generally had his or her participation through conference phone.

Early on, we broke into teams in order to get more "homework" done, exploiting the subgroups for gathering information and fostering deeper insights into starkly differing alternatives (e.g., from selling or leasing the house for a range of potential purposes; to converting it to governmental uses; to rebooting a history museum).

Members of the Task Force made field trips (for example, Bob Dyer and I spent 3 hours with the chief of the National Trust For Historic Preservation at her office in the Watergate); some read widely (including the seminal book on historic house assets: "*New Solutions for House Museums*", see Attachment B); we spoke with/interviewed a spectrum of experts, both locally (e.g. leadership of the Mosby Heritage Area Association, and our own town attorney) and from afar (e.g., the chair of the newly consolidated American Civil War Museum in Richmond); and the group consulted all manner of third party resources, including real estate data and market information, as well as potential partners, to assess the broadest range of alternative uses.

The Report you have before you is the product of many weeks of effort by your duly constituted citizen committee. Our goal was to be helpful in determining what to do now with the unique opportunity, and related challenge, presented by Brentmoor.

The Task Force ~~hopes and~~ anticipates that the community will also read the Report and engage our analysis and conclusions. We all look forward to that... *the House really belongs to the Community.*

I want to thank each of the Task Force members; everyone served with good cheer and generosity of spirit, and provided creative energy and conscientious attention.

Please permit me to offer a special note of thanks to Bob Dyer and Birge Watkins, for stepping in to complete the writing of the final report when scheduling overwhelmed me and unexpectedly required my travel to Japan. As I write this, I have not seen the completed end product, but I have maximum confidence that you will find the Report engaging and useful, and that it will facilitate a serious and productive conversation.

Yours Respectfully,

Yak Lubowsky

Yakir M. Lubowsky
Councilman, Ward Three
Chairman, The Brentmoor Task Force

THE BRENTMOOR TASK FORCE

EXECUTIVE SUMMARY

The Task Force explored and weighed options that emerged from the public meeting with a particular focus on costs and benefits related to each option, and highest and best use of Brentmoor and the Visitor Center. The analysis included an examination of challenges and opportunities with any proposed changes. The Task Force carefully considered the investment that has already gone into restoring Brentmoor and building the Visitor Center, and the years of museum planning and preparation that was done by the Mosby Museum Foundation and successor groups over a fifteen year period.

It became clear early on that the cost of renovations and improvements to Brentmoor to bring it up to code for alternative uses and the restrictions related to the historic easement would be expensive obstacles for any use other than a museum and visitor center in their current configuration.

The Task Force estimates that the cost of changing the current use (Group A3 Classification) to any other use group category, such as residential, office, or retail would start at a minimum of \$50,000 for office use to up to \$200,000 for residential use. Taking into account more than a decade of effort and an estimated investment of \$1.6 million to preserve Brentmoor for public use and to build the Visitor Center, the Task Force concluded that selling or leasing Brentmoor for use other than for a museum would be a significant financial and cultural loss to the community.

The sale of the property with or without improvements would lead to a large financial loss and take a considerable amount of time to accomplish. Losses from a sale could range from \$1.35 million to \$800 thousand.

Leasing the property for a use other than a museum would be a change of use. That would trigger tenant improvements to bring Brentmoor up to code. These improvement costs would far exceed several years of rent. Approvals and construction would be a one to two year process at the minimum. Moving the Visitor Center to Brentmoor would also entail similar costs.

Leaving Brentmoor in its current state is not a viable option either. The Task Force concluded that it needs to become a self-sustaining independent museum and education center open to the public and managed by an effective organization. Furthermore, it needs to be an exciting multi-use cultural attraction that stimulates economic development on Main Street and throughout the community.

Revitalizing the Mosby Museum and enhancing its range of activities would complete the transformation of Brentmoor into an important and exciting community asset that literally attracts visitors from around the world and across the nation.

Recommendation

The Brentmoor Task Force unanimously recommends that the highest and best use and the most fiscally responsible option is that an experienced organization or a new organization be enlisted to manage Brentmoor and the Mosby Museum.

The Stuart Mosby Historical Society (SMHS) has submitted a comprehensive proposal to manage the Mosby Museum along with initial funding from a generous donor.

Their proposal to the Town would be strengthened by the formation of The Brentmoor Trust to serve as an advisory and support organization, possibility with oversight responsibility. The Brentmoor Trust would help ensure that the Town of Warrenton's interests are met and that local fundraising is adequate to support the museum.

Alternatively, if an agreement cannot be reached with the SMHS or another qualified organization the role of the Brentmoor Trust could be potentially enhanced to include all aspects of museum management.

THE BRENTMOOR TASK FORCE

RECOMMENDATION

The Brentmoor Task Force unanimously recommends that an experienced organization and a new organization be enlisted to manage Brentmoor and the Mosby Museum. The Task Force is proposing a new model for managing an historic property and operating a museum that involves two organizations.

This option was selected because it was clear that the sale of Brentmoor and possibly the Visitor Center would lead to a financial and community loss, and leasing the property for use other than a museum or moving the Visitor Center into Brentmoor would require expensive improvements to meet zoning and code requirements, provided changes were allowed by DHR. Use of Brentmoor as a museum does not require major investment or improvements. It does require capable museum management.

The **Stuart Mosby Historical Society (SMHS)** has submitted a proposal with initial funding from a generous donor to manage the Mosby Museum. This would be strengthened by the creation of a new organization, **The Brentmoor Trust** that would serve in an oversight/advisory and support capacity depending on the Town's goals. The Brentmoor Trust would help ensure that the Town of Warrenton's interests are met by sharing museum development experience and assisting SMHS with local area fundraising.

Alternatively, if an agreement cannot be reached with the SMHS or another qualified organization the role of The Brentmoor Trust could be potentially enhanced to include all aspects of museum management. It should be noted that other organizations may also offer a proposal.

This approach is a viable alternative because SMHS has museum experience, a large collection of relevant artifacts, statewide fundraising capabilities, and a strong board.

The Brentmoor Trust would bring together local individuals with the knowledge and experience to revitalize the plans of the former Mosby Museum Foundation in Brentmoor in cooperation with SMHS. SMHS would manage the day-to-day activities of the museum. It is envisioned that the Brentmoor Trust would also be comprised of individuals with strong connections to Fauquier County, which is extremely important for fundraising efforts.

The Town will have to carefully weigh the capabilities of any organization that would assume management of Brentmoor and the Mosby Museum. This would include evaluating their strategic plans and ability to financially sustain operations.

The Town would continue to own Brentmoor, but management of Brentmoor and the Mosby Museum would fall to a new organization. A co-stewardship agreement or lease would serve as an agreement to govern relations between the Town and the managing organization.

The Museum and the Visitor Center would be destinations in themselves, but many other cultural, educational and recreational activities would take place at Brentmoor. The Task Force sees multiple uses for Brentmoor including collaborative efforts with other organizations. A wider range of events and

activities could generate additional revenue as well as promote economic development for Main Street businesses and the community at large. Use of the grounds for a public park and gardens is also recommended.

Brentmoor is an asset many small communities would love to have. It is a stunning property with great historical significance; one that fits in well with the Old Town area and one of the highlights of Main Street. The Visitor Center on the property is very active. With an operating museum in place at Brentmoor, both ends of Main Street would be anchored by museums. These cultural and educational attractions would support economic development on Main Street and throughout the entire community.

Revitalizing the Mosby Museum and enhancing its range of activities would complete the transformation of Brentmoor into an important and exciting community asset that literally attracts visitors from around the world and across the nation.

Recommended Option: Enlist an experienced organization or a new organization to manage Brentmoor and the Mosby Museum

Expected rent of \$1500 per month

Possible \$1 per year lease or a co-stewardship agreement

Pros

Town would retain ownership of valuable asset

Low cost option to the Town

The museum could be open again soon

Boost to heritage tourism and economic development

The Town would be relieved of most management responsibilities

Tenant would pay for utilities, maintenance and most repairs

Similar arrangement to Old Jail Museum with Fauquier County

Potentially could pick up where the Mosby Foundation left off prior to dissolution

No remodeling or restoration necessary

Brentmoor Trust would be a Fauquier County based organization

Brentmoor Trust would have strong connections in the Fauquier donor community

Museum Use respects previous donors to Mosby Foundation

Cons

No or little direct income to Town

Difficult to find organization to lease and manage museum

The new organization could fall short on fundraising

Town continues to own property, a problem to some.

Town may continue with grounds maintenance

Museum would need Visitor Center facilities

Dry sprinkler system needed for museum artifacts
Brentmoor Trust would need a board with expertise, experience, and donor contacts
Challenge of recruiting new board for The Brentmoor Trust after previous problems
Challenges with fundraising for both organizations
Continued public discord in a few quarters
Brentmoor would revert back to Town if organization failed and ended lease

2012/05/04

THE BRENTMOOR TASK FORCE

A REVIEW OF OTHER OPTIONS

The Task Force explored numerous options with a particular focus on costs related to each option and the highest and best use of Brentmoor and the Visitor Center. The analysis included an examination of challenges and opportunities with proposed changes.

While other options have merit they were not selected because the Task Force concluded that selling or leasing Brentmoor for use other than for a museum, or moving town offices and/or the Visitor Center into Brentmoor would be a significant financial and cultural loss to the community.

It became clear early on that the cost of required renovations and improvements to Brentmoor, and historic easement restrictions would be major limiting factors for any use other than a museum and visitor center in their current configuration. The estimated investment in Brentmoor and the Visitor Center is \$1.6 million.

Leasing Brentmoor would be difficult and potentially very expensive. A change of use would trigger required tenant improvements to bring Brentmoor up to code and to make it ADA compliant.

The Task Force estimates that the cost of changing the current use (Group A3 Classification) to any other use group category, such as residential, office, or retail would start at a minimum of \$50,000 for office use to up to \$200,000 for residential use.

Rents would not justify the overall investment in Brentmoor. The cost of improvements would exceed several years of rent. Moving the Visitor Center to Brentmoor would involve the same costs as leasing.

The Town could choose to just sell Brentmoor or it could sell Brentmoor and the Visitor Center and recoup the Town's original investment (\$460,000.) The Town would also capture some of the "investment" made in the project by other public and private contributions. Collectively, it would still be a major financial loss and an affront to other donors.

The option in a distant second place with the Task Force is to move the Visitor Center into Brentmoor while retaining a small museum exhibit. Again, the costs for required improvements would be significant.

The Task Force did not consider Town management of the museum as a viable option except in the context of a combined visitor center and museum in Brentmoor. The Town has never expressed an interest in actually managing a museum with Town staff.

Please note that estimated sale prices and improvement costs are based on professional real estate evaluations. They are not based on professional appraisals.

Other Key Options

1. Sell Brentmoor (and Visitor Center)
2. Lease Brentmoor
3. Move the Visitor Center into Brentmoor, retain some museum exhibits and use Visitor Center for Town Offices (Also move Town or County office into Brentmoor)

Key Considerations

1. The Town has a substantial investment in Brentmoor and the Visitor Center
2. Many other public and private donors have an even larger "investment" in Brentmoor
3. Brentmoor has been restored at great expense to function as a museum
4. Brentmoor and the Visitor Center were designed to work together
5. The Visitor Center is located where it is because of Brentmoor
6. Brentmoor is subject to restrictions of a DHR easement on the property
7. Any alterations or improvements to Brentmoor require DHR approval
8. Exterior changes to Brentmoor are subject to Warrenton Historic District guidelines
9. Brentmoor lacks adequate bathrooms, kitchen, direct parking, garage
10. Brentmoor would require rezoning for most alternative uses
11. Brentmoor and the Visitor Center received federal and state grants for specific purposes
12. Extensive non-historic alterations to Brentmoor may result in tax credit problems
13. Parking and bathrooms for Brentmoor are at the Visitor Center
14. Offices and conference rooms for the Mosby Museum are at the Visitor Center
15. Brentmoor is not fully ADA compliant
16. Current Town maintenance costs are minimal
17. Museum artifacts may be lost to the community with alternative uses
18. Many citizens see Brentmoor as a great asset to the community that should be retained
19. Many citizens are frustrated that a museum is not operating, but they would still welcome a dynamic museum at Brentmoor
20. Some citizens have expressed dissatisfaction with Town ownership of Brentmoor and a the concept of a Mosby Museum

Option One Sell Brentmoor (and Visitor Center)

There have been some suggestions that the Town of Warrenton simply put Brentmoor on the market and sell it as soon as possible. While this may sound easy, there are serious complications to consider and very little upside. Additionally, the Task Force looked at selling both Brentmoor and the Visitors Center, an option that also sounds easy, but could be difficult and costly to implement. All sell options would most likely result in a significant financial loss to the Town. The community benefits of the Visitor Center would be gone if it was also sold.

1A Subdivide House from Visitor Center and Sell House As-Is. (Sell Visitor Center)

Estimated sale of Brentmoor at \$450,000 to \$500,000
Estimated sale of Brentmoor and Visitor Center at \$1,120,000 (+/- \$50,000)
Marketing time estimated to take up to a year
Settlement costs of \$20,000 for Brentmoor
Settlement costs of \$40,000 for Brentmoor and Visitor Center
The current maintenance cost of Brentmoor to the Town is minimal
Subdivision approval would be required
DHR easement allows subdivision from Visitor Center

Pros

One time financial recovery to Town with sale of both properties
Cash proceeds from sale available for other Town use
No more ownership, responsibility or maintenance costs for town
Property would generate real estate taxes and possibly business taxes
Avoids controversy over Civil War and other related issues
Avoids risks of museum failure or lack of interest in Civil War history

Cons

Major financial loss to Town considering total amount invested in project (\$1.6 million)
Loss of \$1.1 million +/- with sale of Brentmoor only
Loss of \$480,000 +/- with sale of Brentmoor and Visitor Center
No net financial gain to the town after 15 years of ownership
Once sold, an important and unique historic town asset is probably gone forever
No public use expected if sold
Difficult property to market
May require zoning change

Potential public outcry over sale of public asset (and at a loss)
An offense to private and other public donors, possible consequences
Possible consequences from misuse of federal and state grant funds and tax credits
Difficulty selling property with no bathrooms or kitchen
Backyard includes Visitor Center with parking and frequent traffic
Visitor Center loses some viability if property is subdivided
Buyer may flip property or sell later for undesirable use
Visitor Center is very active community asset
New Visitor Center location would be needed

1B Subdivide House from Visitor Center, improve kitchen and bathrooms, then sell as residence

Expected sales price of up to \$1,000,000
Expected improvement costs prior to sale of approximately \$200,000
Expected time value and efforts regarding easement and zoning compliance of \$50,000 to \$100,000
Construction and approval time 6 to 18 months, maybe longer with DHR and rezoning
Marketing time about six months after completion of construction
Never a kitchen in the house, previously an addition that was removed
Never a main floor bathroom in house

Pros

Same as 1A

Cons

Same as 1A except loss figures
Estimated loss of \$800k
Additional \$200k cost to Town of improvements as a residence, kitchens/bathrooms
Uncertainty and long drawn out approval and renovation process
Risk of unexpected and costly problems with renovations
Visitor Center in backyard with parking and frequent traffic
No garage or parking on Brentmoor portion of subdivided property

1C Subdivide House from Visitor Center and sell to non-profit that would open the house to the public

Maximum sale price probably closer to \$250,000, rather than \$500,000

Pros

Preserves and showcases Brentmoor history and restoration

Home is open to the public

May support economic development in Old Town and heritage tourism

Cons

Loss of about \$1.35 million

Much lower expected sale price

Few potential buyers

Major loss considering the total amount invested in property

Town loses control of asset

Major renovation costs to buyer

DHR restrictions and approvals

Possible limitations on extent of being open to the public

Owner may still be dependent on Visitor Center for facilities

Buyer may flip property or re-sell later

Option Two Lease Brentmoor

Leasing Brentmoor poses even more challenges than selling Brentmoor unless the tenant is willing to pay for major improvements, which is unlikely. The initial costs to the Town of leasing to a business or other private concern could be significant. These include bringing Brentmoor up to code for alternative use and making it ADA compliant. Leasing to a non-profit for a Mosby Museum is not addressed in this option since code problems are avoided.

Expected rent of \$2500 per month plus or minus \$500

Possible renovation costs at Brentmoor of \$40,000 to over \$100,000

Town would normally pay for improvement costs to allow for business use

Improvement costs uncertain, but estimated at from \$40,000 to over \$100,000

DHR approval required for all changes

Zoning change required

May take five years or longer to recoup additional remodeling costs

Pros

Lease income for Town of about \$30k per year
Tenant would pay for utilities, maintenance and most repairs
May generate business tax revenue
Potential economic development benefits
Lower maintenance cost to Town
Kitchen may not be necessary
Brentmoor historical details maintained
Tenant improvements are permanent

Cons

Income from lease very low in relation to capital investment
Expected rent for a non-profit even less than a business
Improvement costs to town could be significant
Time to make improvements could be one to two years
Town becomes a landlord
No public use
No parking on site, except street and Visitor Center
Tenant problems and risks

Option Three Move Visitor Center to Brentmoor, Retain Some Museum Exhibits, and use Visitor Center and/or Brentmoor for Town Offices

This option would dramatically change the original planning and implementation of the Visitor Center and Brentmoor, both which were designed, sited, and built to be complementary to each other in their current locations and configurations. This could be a permanent move or a temporary. For example Brentmoor could be used as a visitor center in the short term (1-2 years) and then become both a visitor center and a museum later, or it could be used solely as a Visitor Center with a small exhibit. Later, all the space might be utilized for a museum.

Again, zoning and code requirements for change of use must be met and DHR approvals will be required.

It should be noted that the Town owns other properties in Warrenton that could provide office space in the future. If Town or County offices were to move into second floor in Brentmoor, the pros and cons would be similar to a business lease.

The Town received federal money for construction and operation of a visitor center, not town offices

The Visitor Center has become a very active and well known community resource
Move might reduce future Town rental cost elsewhere from \$3000 to \$4000 a month
Town would most likely have to pay for visitor center and museum staff
Bathrooms on main floor would take away from exhibit space

Pros

High Main Street visibility for Visitor Center
Fully utilizes Brentmoor space, ends vacancy
Possible income from lease to County
Economies of scale for Town staff/museum staff
No loss on investment
Reduces Town's rental costs elsewhere
Preserves Brentmoor history and restoration efforts over 15 years
Maintains some museum exhibit space
Some exhibits already in place
Built in traffic for a small museum in Visitor Center
Brentmoor is open to the public

Cons

Possible improvement costs at Brentmoor of \$40,000 to over \$100,000
Major loss of museum exhibit space to Visitor Center and improvements
No income from admission fees since Visitor Center and Museum combined
Town staff has no museum management experience
Visitor Center staff not historians and museum managers
Little parking close to Brentmoor
Difficulty getting from Brentmoor to Visitor Center
Difficult ADA accessibility from front, not fully ADA compliant
No suitable bathrooms or elevators
Ground floor bathroom would take away one entire room of museum space
Cost to Town of improving facilities in Brentmoor
Continuing maintenance costs to Town
Difficult to attract non-profit for museum management
Possible misuse of federal and state grant funds, and tax credits

THE BRENTMOOR TASK FORCE

BACKGROUND ON THE PRESERVATION OF WARRENTON'S BRENTMOOR AND EFFORTS TO CREATE A MOSBY MUSEUM

There is a long, at times turbulent, history to Warrenton's multiple attempts to establish a Col. John S. Mosby Museum at Brentmoor, the last and finest of Col. Mosby's three residences in Warrenton.

For many years, the idea of creating a Mosby museum in Warrenton was discussed, but efforts were limited to an occasional exhibit at the Old Jail Museum. It wasn't until 1998 that the Spilman-Mosby House at 173 Main Street came on the market. It was owned by the Shepherd family, but had been vacant for eleven years.

Mayor George Fitch and his wife, Patricia Fitch, considered purchasing the house as their residence. After deciding not to do that, Patricia suggested that a private group be assembled to purchase Brentmoor and create a Mosby museum. After considerable effort, the group decided that there was simply not enough time to raise the necessary funds to purchase the house. The idea was abandoned.

Birge Watkins, a member of the group, was serving as Chairman of the Partnership for Warrenton Foundation. He was familiar with historic house museums and saw the economic development potential of Main Street Warrenton anchored by museums at both ends. He also knew that the Town of Warrenton had been generating a large budget surplus every year. Together, with Angela Denison, the Executive Director of the Chamber of Commerce, and Jackie Lee, the Director of the Old Jail Museum, he approached Mayor Fitch with a proposal calling for the town to purchase Brentmoor. Mayor Fitch immediately embraced the idea.

Mayor Fitch introduced the concept to the Town Council and staff at a work session on October 8, 1998. Birge Watkins and others spoke at work sessions on December 3, 1998 and January 7, 1999. Local newspapers and the Washington Post also got wind of the idea and began covering the story.

The public hearing on January 12, 1999 attracted a large group of supporters and a few detractors. On January 13, 1999, the Warrenton Town Council unanimously approved the purchase of Brentmoor for \$460,000. Joe Allen, the realtor handling the sale of Brentmoor, became the first donor when he contributed his real estate commission.

Many of the arguments in favor of the Brentmoor purchase focused on the Colonel Mosby's continuing and substantial legacy in the Piedmont area. Preserving Brentmoor, a fine mid-19th Century Italianate residence on the Main Street of Old Town, appeared justified due to its historical significance, its tie to the story of the Grey Ghost of the Confederacy, and the visitors' attraction it might provide, supporting heritage tourism/economic activity in the town.

Arguments against the purchase focused primarily on the cost to the Town of the acquisition and questions about honoring Col. Mosby.

Concurrently, a private group led by George and Patricia Fitch, Birge Watkins, David Norden, Cheryl Shepherd, and Ed Tolson was assembled to form a non-profit organization to develop and manage the museum. After a few different board configurations, The John Singleton Mosby Museum Foundation

was finally incorporated in mid-1999 and later received tax exempt status. The Foundation was created to conduct restoration efforts and to lease Brentmoor from the Town. Thanks to successful fundraising efforts early on, the renovation of Brentmoor started and planning for the museum began almost immediately.

The Town Council approved a rezoning of the Brentmoor property from residential to public/semi-public and approved a special use permit for the Visitor Center. The Town remained very active as the owner of the property and recipient of grants initiated by the Mosby Foundation. The Town also maintained the grounds.

An historic easement from the Virginia Department of Historic Resources (DHR) was placed on the property in November 2000 and ultimately led to the receipt of tax credit funding in 2012.

After the Foundation Board was established, an Executive Director was hired. Mayor George Fitch, Councilman David Norden and Councilman Birge Watkins all served on the Board along with numerous other community leaders, historians, restoration experts, and local philanthropists. Norden served as President for many years with Watkins as Vice President. Later, Watkins became President.

The Foundation also formed a Museum Advisory Board comprised of some of Fauquier's leading citizens and an outstanding Authors and Historians Advisory Board.

The plan was that Brentmoor would undergo a major, historically correct, renovation and a portion of the land directly behind the manse would be used to build a new Visitor Center for the Town and County. The adjacent Visitor Center would have connected parking facilities off Main Street. A walkway would link the two buildings. The Visitor Center would also house offices for the future Mosby Museum staff and include a medium-sized conference/seminar facility that would be used as the Mosby education center and a community center. It was a jointly planned civic campus. These goals were all achieved. Eventually, the outbuildings were to be restored and gardens revitalized. It was envisioned that the entire site would be a park.

The Foundation board decided that a complete restoration of Brentmoor would be better than a piecemeal restoration. Brentmoor needed more than just a paint job. The house was completely restored from head-to-toe including chimney repairs and a new roof, new plaster and window repairs, and removal of a bathroom and an attached kitchen. A geothermal system was installed. Restoration efforts were designed to meet American Museum Association standards and follow DHR guidelines. It is estimated that over \$1,000,000 was raised and spent on renovations and operations. While the restoration took longer than expected, the renovations were designed to last another 150 years.

Meanwhile, the Visitor Center was built on the property to serve visitors coming to Warrenton and Fauquier County, and also to provide Brentmoor with offices, a gift shop, conference room, community education room, ADA compliant bathrooms, and parking. The Visitor Center was conceived, designed and built to be a complement to Brentmoor. It was envisioned that both buildings would attract visitors to Warrenton. Grants to support the construction of the Visitor Center were received from the U.S. Department of Transportation. David Norden of Hinckley, Shepherd and Norden architects designed the Visitor Center at no cost to the Foundation. The new Visitor Center opened in fall 2006 in advance of the completion of the Brentmoor restoration.

During this time, planning was also underway for the operation of the museum. Marketing strategies were developed. Artifacts were collected. Extensive work was completed on policies and procedures related to museum operations. Educational programs for school children were started and private tours were frequently conducted. A number of fundraising events were held at Brentmoor and at other venues. The foundation held open houses to demonstrate the progress of renovations. Mosby Museum marketing was supported by a newsletter and website. A national television show on ghosts was filmed in Brentmoor. Brentmoor became the starting point for the annual Christmas parade. Heritage Day was a by-product of the Mosby Foundation.

Exhibit planning was well underway. While the focus was on Mosby, museum display and education plans represented both sides of the Civil War with emphasis on activities and reconciliation following the war. Many potential donors and lenders of artifacts, including Mosby descendants, were ready to move forward with gifts once the museum was on the verge of opening. Plans also included rotating exhibits and artifact loans from other museums. Story boards were designed and created and are now on display in the Visitor Center.

Considerable financial support came from local sources, including well heeled individuals, and from state and federal grants. Foundation fundraising efforts were very successful, aided by a series of major fundraising events, foundation support, small donations, and, again, significant gifts by several well-known families in the area.

Fundraising events like the Blue and Gray Ball raised thousands of dollars. The foundation even sponsored a brick campaign which did well.

At one point, Congressman Frank Wolf toured Brentmoor and reviewed museum plans. Shortly thereafter, he arranged for a federal economic development grant of \$100,000.

Financially, the Mosby Foundation was very successful in raising funds for restoration and for Foundation staff expenses. For example, on January 1, 2008, the Foundation had \$95,360. During the year, they raised \$352,000 and spent \$258,000. As of September 30, 2008 the foundation had \$189,377 in the bank.

Other organizations though out Virginia were working with the Foundation such as the Journey through Hallowed Ground (JTHG), the Mosby Heritage Area Association, and the Civil War Trust. JTHG was planning to designate the Mosby Museum as an "anchor destination" along their multistate journey.

The Mosby Foundation celebrated the completion of renovations with a "bare bones" reception on December 6, 2008. At that point, intensive museum implementation was beginning to get underway.

By early 2009, none of the original founders or officers were still board members. Mayor Fitch left in the mid-2000s, David Norden left in 2008, and Birge Watkins left in January 2009. All were subject to term limits prescribed in the Foundation bylaws.

A Sad Loss and Litigation

In January 2007, Harold Spencer, one of the Foundation's board members and a well-known and beloved local businessman, died after falling into an uncovered historic cistern near the front of the Visitor Center. Spencer was a strong supporter of the Mosby Museum project.

The Spencer family filed suit against the Town of Warrenton in early 2009. Because the Mosby Foundation technically had a lease on the property it was determined that the Foundation was also at financial risk. The litigation was of great concern to the Foundation, but despite the stress of a lawsuit, museum development efforts continued unabated well into 2009.

Eventually however, the litigation took its toll. The Foundation ended their fundraising activities around mid-year and by late 2010, the Mosby Museum Foundation dissolved.

In October 2009, \$1.25 million was paid to the family in settlement. As the lengthy period of litigation neared a conclusion, the museum project and related Foundation activity were effectively shut down. These developments had painful fallout, as the Mosby Museum project suffered, and the town was criticized, harshly, by certain members of the community.

Years of Success End Abruptly

By the end of 2008 The Mosby Foundation had successfully renovated Brentmoor, the Visitor Center was in operation, detailed plans were in place for opening the museum, artifacts were donated or loaned and more were on the way, and fundraising was going very well. There was great support in the community and heightened anticipation about the new museum. The John Singleton Mosby Museum Foundation had successfully set the stage for the opening of the museum. Unfortunately, the litigation ended all forward progress.

A New Start

The Mosby Museum project remained relatively dormant until 2012, when a new effort was launched to bring Brentmoor back on-line.

State tax credits amounting to \$138,000 were obtained from the Virginia Department of Historic Resources (DHR) and provided an additional source of museum completion funding. (The tax credit transaction was structured in a standard, if highly complex, form of a hybrid LLC entity, partly owned by a local 501(c)(3), and partly by a private investor, which made a stream of "lease" payments in return for the tax credits.) The museum project was temporarily revitalized with new funding.

In 2012, Mayor Fitch organized a group of Town residents to act as the steering committee for opening the Mosby Museum (in its prior years, the museum had only opened on a few occasions (even as the Civil War Sesquicentennial had commenced in 2011 with obvious opportunities for promoting the Mosby connection). The Mayor's wife chaired the new committee. During early fall 2012, the committee worked diligently, decorating the home, creating a marketing subgroup, and buying and borrowing additional artifacts and period furniture. (though no authentic materials from the House or Mosby family). Several items were loaned by a Mosby descendant on the steering committee and other items lent by the Stuart/Mosby Cavalry Museum in Centreville.

The museum wasn't without its flaws, but the ground floor at Brentmoor housed a very credible start of a true house museum with a good preliminary collection. The upper floor of the house remained vacant, but it was used to highlight certain aspects of the architecture and recent renovations. Many visitors wanted to see Mosby's bedroom.

A Mosby Museum "soft" grand opening in the first week of December 2012 was conducted. The event was a success, aided by the work of a handful of volunteers, interns from GWU's museum management

program, the local community college and Fauquier High School. The attendance count was well over 200. Key contributors included Dave Goetz (a local Mosby historian and member of the current Task Force), Rex Cooper (a descendent of Col. Mosby), and John Quarstein (a museum consultant) all of whom provided robust interpretive tours working as team. An exit survey confirmed the success of the program in the minds of attendees.

Due to internal disagreements, several of the key steering committee members resigned shortly after the soft opening, but the momentum and support was strong enough to pull together a formal Grand Opening on March 9, 2013 (a date selected as it corresponded to Mosby's famous raid in Fairfax, Virginia where he captured a Union general, returning his captive to Warrenton by horseback in a celebrated ride).

The formal Grand Opening was also a successful event. A keynote seminar was presented by a Western Kentucky University history professor, author of the book, *The Grey Ghost*, and interpretive tours of Brentmoor were offered. Total attendance was around 60 persons.

The Museum continued in operation 3 days per week until November 2014 when it closed again, as the tax credit funds had run out. Unfortunately, the steering committee did not initiate any successful fundraising activities similar to those conducted by the former Mosby Museum Foundation.

Mayor Fitch, by then the former Mayor of Warrenton, passed away on December 30, 2014, and by operation of the leases and other agreements, and passage of time, the Mosby House reverted to direct town control.

The successor Mayor of Warrenton, Powell Duggan, sought a disposition of the Brentmoor property, after the building was secured, and the collection inventoried.

Town Councilmen, Yakir "Yak" Lubowsky, chairman of the current Task Force, suggested holding a "Town Hall" type meeting for all interested members of the community. A well-publicized meeting was finally held in September 2015, during the Town's Heritage Day program. To prime interest, a tour was offered of Brentmoor the same morning. Attendance at the full meeting was strong, numbering over 60 individuals representing nearly all constituencies of the Town (history buffs, business people, former Mosby Foundation board members and volunteers, nearly all the town council members, the press and many local residents).

Councilman Lubowsky led the meeting and "white boarded" the major options proposed for the fate of Brentmoor, to be communicated to the Town Council at a later date. Option clusters were: outright sale, leasing the property to a for-profit or non-profit entity, rebooting and making another effort to open the facility with the Town's ownership of Brentmoor and management by a foundation, working with "partner" organizations (historic and otherwise) to run the museum.

Significantly, in a straw poll at the end of the "Town Hall" session, a show of hands indicated that a substantial majority of the attendees did not wish to see Brentmoor sold. The general feeling was "let's find a way to make it work." Lubowsky asked for the attendees to indicate on the signup sheet if they were willing to serve on a smaller task force that would undertake rigorous analysis of the options for Brentmoor, and make a final recommendation to the Town Council for its ultimate determination.

Twelve task force members (six chosen by Lubowsky and six more designated by the other town council members), with Lubowsky as chairman, were empanelled and met regularly between mid-November 2015 and late January 2016 to explore and assess options for the Mosby House.

The Task Force's investigation, analysis and conclusions are the subject of this report.

APPENDICES FOR THE BRENTMOOR TASK FORCE REPORT

Attachment A -- Biographies of Task Force Members

Attachment B -- Implementation of the Task Force Recommendations

Attachment C -- Important Reference for Task Force Work

**Attachment D -- Town Attorney's list of Conditions for Brentmoor
Occupancy and the DHR Easement**

Attachment E -- The Tax Assessment

Attachment F -- Exchange of Communications on Zoning Determinations

Attachment G -- Toward the Concept of Multiple Programs for Brentmoor

Attachment H -- Photos of Brentmoor home inside and outside

Attachment I -- Proposal from the Stuart/Mosby Historical Society

Attachment J -- Deed of Easement for Brentmoor House

Attachment A --Biographies of the Brentmoor Task Force Members

Bob Rust is a principal of Iron Ox Development Corp.; the managing broker of Iron Ox Real Estate; and owner of the White Horse Auto Wash car wash chain which has locations in Warrenton, Woodbridge and Charlottesville. He started his business career in Philadelphia working for Goldman, Sachs and Company and was part of a team responsible for \$3.5B in assets. He graduated with a bachelors from Virginia Tech and a masters from the London School of Economics. He lives in the Town of Warrenton with his wife and four kids, and currently sits on the Board of the Saint James Episcopal School.

Robert F. (Bob) Dyer

Robert F. (Bob) Dyer is an Emeritus Professor of Marketing at George Washington University. His BBA ('65) and MBA ('66) are from Bowling Green and his PhD from the University of Maryland. He continues to teach on-line courses for GWU and is an active writer of case studies and articles focusing on consumer safety issues and Nordic companies. In 2006 Bob was a recipient of a Fulbright Program Award as Distinguished Chair and Guest Professor to the Technical University in Lisbon, Portugal. He has written in most of the top journals in the marketing field focusing on marketing and public policy issues and the use of CRM and decision support technology in marketing. For ten years, Bob was the Associate Dean for Graduate Programs at GWU's Business School and led faculty efforts to create the Executive MBA, the Professional MBA and the Global MBA programs. Bob has been a guest professor abroad in France, Ireland, Egypt, Sweden, and Portugal. Bob was a faculty member at Westminster College, Bowling Green and Maryland prior to GW. He has served as the President of the Washington, DC American Marketing Association and held the position of Vice President of Collegiate Activities and Board Member for AMA National. His consulting assignments have included work with the U.S. Federal Trade Commission and the U.S. Food and Drug Administration. For many years he offered a popular executive development program on the topic of "Marketing Research for Results."

Bob and his wife, Ann-Marie, live in Sweden during the summer. His sports passion is golf and he plays for the senior men's team for his club in Warrenton, Virginia.

A Brief Bio for David Goetz

David Goetz owns **Mosby's Confederacy Tours**, and leads tours *in* "Mosby's Confederacy", including Virginia counties of Fauquier, Loudoun, Warren and Clarke. He has published "*Hell is Being a Republican in Virginia*": *The Postwar Relationship Between John Singleton Mosby and Ulysses S. Grant*, which examines the pursuit of peace and reconciliation between North and South by Colonel Mosby and President Grant.

Mr. Goetz is descended from the family of **Chaplain Father James M. Graves, S.J.**, who served with Generals Joe Johnston and Stonewall Jackson in the Army of Virginia in 1861-62. He is a past commander of the Black Horse Camp #780, Sons of Confederate Veterans in Fauquier County, Virginia, serving from 2009-13.

Mr. Goetz has a professional background in public relations, sales and marketing, primarily with non-profit organizations. He holds an undergraduate degree in English from Bellarmine University, Louisville, Kentucky, and a Master of Science degree in Community Development from the University of Louisville. He is a U.S. Army veteran, received an Honorable Discharge, and lives in Culpeper County, Virginia.

Birge Watkins

Birge is currently Vice Chairman and a Director of CoreVest Financial Corporation, and a director of Imperial Capital Corporation and Managed Investment Opportunities Corporation. All three companies are associated with a New York hedge fund. He is also a Director of The Lowell Group, a private equity investment company. His business background includes real estate and financial investment with Trammel Crow Company and FBR Investment Management. He is a consulting partner with Encompass Real Estate Advisors.

Birge serves as Vice Chairman of the Council for American Universities Abroad and is a Director and former Chairman of the Land Trust of Virginia. He is a Commissioner and former Chairman of the Vint Hill Economic Development Authority. He served as Staff Assistant to the President for Economic Affairs in the Ford White House, Assistant Director of President Reagan's Task force on International Private Enterprise at USAID, Deputy Assistant Secretary of Agriculture under President Bush (I) and Director of National Investor Outreach for the Resolution Trust Corporation.

Birge was a founder, director and former President of the John Singleton Mosby Museum Foundation and a former at-large member of the Warrenton Town Council. He has a BA degree from Alma College, an MBA from the London Business School, and an MPA from the Harvard Kennedy School.

Terrence L. "Terry" Nyhous retired from the U.S. Air Force in 1990. He served as Deputy Assistant Secretary of Defense during the administration of President George H.W. Bush. Terry worked as a senior consultant for Price Waterhouse LLP, advising clients worldwide on the impact of Federal spending on business plans, mergers & acquisitions, and related subjects. He moved from the Washington, D.C., area to Warrenton, Virginia, in 1999. He served on the Warrenton Town Council for four years and as a member of the Fauquier County Board of Supervisors for an additional four years. Terry is a graduate of the United States Military Academy at West Point, New York, and holds a Master of Public Affairs degree from the University of North Dakota.

Edward B. Wright III is a fifth generation Realtor at Wright Realty, Inc., a 70 year old real estate company that focuses on appraisals, sales, leasing and property management. Ed's work focuses on commercial sales, leasing, and property management and was recently chosen as one of 2016 Top Real Estate Agents by Northern Virginia Magazine.

Ed, his wife Kimberly and three children, reside in Old Town Warrenton, VA. Ed grew up in the colonial town of Buckland on the edge of Fauquier County at Cerro Gordo. Ed is a graduate of the University of the South in Sewanee Tennessee with a B.A. Degree in Economics.

Melissa Wiedenfeld began her career in historic preservation at Texas Tech University as a graduate student. After graduation, she spent several years working as a Historic Preservation Planner for the State of Florida, conducting historic resource surveys, developing a statewide historic bridge survey, and assisting with the Historic Preservation Grants Program. She continued her historic preservation career in Louisiana while earning a Ph.D. in History at Louisiana State University, working closely with archaeologists and engineers on a variety of projects. After a hiatus in academia and a few years in the Galapagos Islands in Ecuador, she returned to work as a historian/historic preservation consultant for a firm in Austin, Texas. In 2007, Dr. Wiedenfeld moved with her family to Warrenton and continued her career as a historic preservation consultant, managing a variety of preservation projects including HABS/HAER/HALS documentation, interpretative signage for historic districts, historic resource surveys, historic context development, and preservation management plans. She has worked on projects from Maine to Hawaii to Puerto Rico, including several in Virginia.

Mitch Oldham moved to Warrenton in 1995. Engaged in residential real estate appraisal for the majority of his working career. Migrated to tech work as a Systems/Network Engineer before somewhat early retirement due to multiple medical challenges. President of North Rock HOA for the past 4 years.

Paula Johnson

Paula has lived in Warrenton for almost fourteen years with her husband, Dr. Ted G. Johnson and they have three grown children. Her professional career was with Northwest Orient Airlines as a flight attendant based in Minneapolis, Minnesota flying nationally and internationally. Living in Virginia, Paula became intensely interested in the area history. To that end, she became a committee member of the John S. Mosby Museum Foundation in 2003, then Special Events Chair and a Foundation Director in 2004 through 2010. Her responsibilities included the annual Blue and Gray Ball event (creating the ball arrangements and chairing the Ball Committee), the Mosby House Tour Guide, and other Foundation special event arrangements. During that time, Paula was the originator of the Mosby Players - www.mosbysplayers.org. The interpretive group gave performances to educate and preserve the 1860 – 1865 period of time through first person portrayals and have appeared at various area events since 2007. The Mosby Players gave presentations at Brentmoor and have provided *Mosby Town Tours* regarding Warrenton history and especially focused on locations pertinent to Col. John S. Mosby. Also while on the Mosby Board, she was one of three founding originators of the Warrenton - Fauquier Heritage Day event. As the event chair, she completed the eleventh annual event in Old Town Warrenton and Courthouse Square on 26 September 2015. In 2008 Paula was one of the founding members of the Fauquier Heritage Institute with the Fauquier County Library sponsoring a lecture series of Virginia and American history through 2010. Also for Fauquier County, Paula was the 2009 Parade Chair for the Fauquier County 250th Anniversary Celebration and planned the program of events. Paula has served on many historical foundations including the Germanna Colonies Foundation from 2009 - 2012, the Buckland Preservation Society as the Special Events Chair and coordinated the 2009 Blue and Gray Ball at Buckland Farm, was a docent with the Liberty Heritage Museum from 2013 - 2014 and the Brandy Station Foundation as a Ball Committee Member in 2012 and then a Board Director in 2013 through the present. Paula was a Sesquicentennial Committee Member with Fauquier, Culpeper, and Prince William Counties and served as the Fauquier Chair from 2012 - 2015. In December 2015 to date she has served with the Brentmoor Work Group.

David C. Gerrish Jr.
Financial Advisor
Senior Vice President – Branch Manager

For over 35 years, Dave has earned the trust and confidence of his clients by addressing their individual financial needs at varying degrees of complexity. He is a firm believer in planning before investing and keeps a watchful eye over the next stage in his clients' lives. Preparing for his clients' retirement and how best to replace their earned income with various retirement income sources occupies the lion share of his time.

Dave earned a degree in Aerospace Engineering from Virginia Tech and an MBA from Southern Illinois University. He served his country as a military aviator, both on active duty with the US Air Force and in the reserves with the Virginia Air National Guard. Although he has practiced in the field of financial planning for several decades, Dave's engineering roots are evident in his disciplined approach to portfolio management. Dave started his career with Wheat First Securities in Warrenton and has called Main Street his home ever since.

As a beacon for his community, Dave has been involved in numerous charitable organizations and committees:

- . He spent twelve years as a volunteer serving on the board of the Fauquier Hospital Foundation including four years as its chairman.
- . He held the position of treasurer for the Warrenton/Fauquier Chamber of Commerce.
- . Dave served as chairman of the Partnership for Warrenton, the local manifestation of the National Trust for Historic Preservation.
- . He Co-founded the non-profit Northern Piedmont Community Foundation, which continues to grow and serve the local and regional community today.
- . Dave served locally as Scoutmaster and Assistant Scoutmaster with the Boy Scouts of America for over ten years until his three boys were grown.
- . Dave, along with his father and other community members, has been instrumental in the founding, fund raising, and construction and maintenance of the Fauquier Veterans Memorial.

When Dave isn't working he enjoys general aviation flying, wood-working, day hiking, as well as some backpacking and camping in the Blue Ridge Mountains. Of course, rooting for the Washington Nationals occupies his time from spring through fall.

Dave and his wife, Virginia, live in Old Town Warrenton.

[Yakir M. Lubowsky -- biographical entry on Town of Warrenton Website]

Council Representative, Third Ward; Liaison to the Town Planning Commission; Chair, Emergency Preparedness Task Force; Representative previously on the Architectural Review Board (ARB); Regional Commissioner, Planning District Nine

Business and legal strategist; and combustion energy /power generation technology developer.

BA (politics & strategy, with highest honors), The Johns Hopkins University, Baltimore (graduated first in the class of 1979); JD (law degree), Northwestern University, Chicago, 1984, editor of *The Journal of International Law and Business*; founding president, the Law School's Federalist Society chapter.

Defense and foreign policy assistant in both the U.S. House and Senate. Long experience as political speechwriter. Practiced law on Wall Street (Milbank, Tweed, Hadley & McCloy). Part of senior management at three companies (two of them start-ups). Director of eight civic organizations, an international human rights group, a technology development partnership and a corporate shareholder trust.

An active preservationist and farm/open space advocate, writing often on land use/conservation issues. President of the Fauquier County Historical Society; co-founder of the Balanced Growth Alliance; past president of CFFC (the county's conservation organization); immediate past chairman of the Fauquier Business Advisory Committee (BAC); broad experience managing election campaigns; former candidates' chairman of the Fauquier Republican Committee. Writer and lecturer on political strategy.

A continuing member in good standing of the New York Bar.

Among relevant honors: a civic commendation by the Virginia General Assembly; twice Fauquier Citizen of the Year, 2004 and 2012 (Center District); commissioned a Kentucky Colonel for Civil War preservation work.

Hon H. Dudley Payne, Jr. (Judge, Ret)

H Dudley Payne, Jr. was born in 1945 in Rocky Mount, North Carolina. Beginning in 1946 lived in Arlington, Virginia with his family until he departed for college at Wake Forest University in 1963 . He has a younger sister, Sue, and they grew up as the fortunate children of parents who served as a career FBI Special Agent and homemaker in all the best senses of the word.

Upon graduation from Wake Forest in 1967, Dudley enrolled in Officer Candidate School of the United States Marine Corps in Quantico, Va. After completion of his training as a Forward Observer and Marine officer in artillery, he was transferred to combat units in Viet Nam, arriving in September, 1968. In Viet Nam, he first served with infantry units as a forward in the most remote reaches of South Viet Nam near the Demilitarized Zone separating North vs. South Viet Nam. His tour ended on February 25, 1969, when his unit was hit by "sapper squads" of the North Vietnamese Army. He was sent to Oakland Naval Hospital in Oakland, California to recover from his wounds.

Finishing his tour with the Marine Corps in 1970, he enrolled in the Columbus School of Law, Catholic University of America, in Washington, D.C. While in law school, he served as the Managing Editor of the *Catholic University of America Law Review*.

Following his graduation from Law School in 1973, he engaged in the private practice of law throughout Northern Virginia until 1995 (his offices were in Marshall and Warrenton, Virginia).

Between 1974 until 1977, he served as an Assistant Commonwealth's Attorney in Fairfax County, Virginia. prosecuting criminal offenses from traffic cases to murder.

In 1995, Judge Payne was appointed by the Virginia General Assembly to the bench of the 20th District Juvenile and Domestic Relations Court, serving Loudoun, Fauquier and Rappahannock counties. He served this court for 12 years, retiring in 2007. He continues his service to his community by engaging in the private practice of mediation as the owner of Payne Mediation LLC in Warrenton, Virginia.

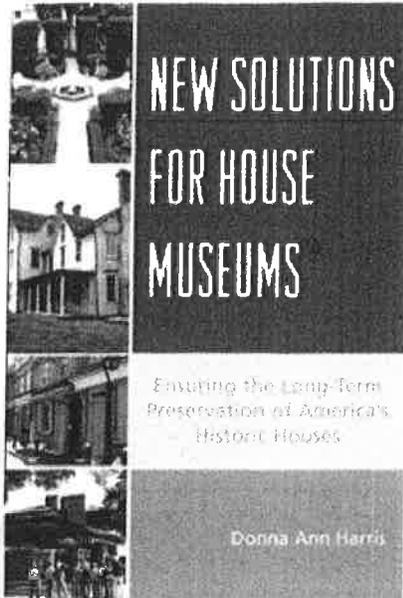
The true "loves of his life" are his wife of nearly 37 years, Ann, and his sons, Edward D., J. Strickland (Strick) and Dudley III, all of whom live in Fauquier County, Virginia.

Attachment B -- Implementation of the Task Force Recommendations

Several steps are needed to take action on the Task Force Report:

- 1. Schedule Meeting with Powell Duggan, Brannon Godfrey, Yakir Lubowsky and the Officers of the Stuart/Mosby Historical Society in attendance. Visitor center conference room suggested following a tour of Brentmoor.**
- 2. Decision must be made concerning whether to offer SMHS a lease arrangement or a co-stewardship agreement. The lease or agreement must be drafted and presented to SMHS. (Examples of co-stewardship agreements are available from the Task Force.)**
- 3. A mutual agreement must be made about the relationship between a prospective new entity, the Brentmoor Trust, and the Stuart/Mosby Historical Society.**
- 4. Arrange meetings with SMHS officers and the following persons/officers of the Town of Warrenton:
Brannon Godfrey, Town Manager, Bo Tucker, Physical Plant, Warrenton/Fauquier Visitor Center Director and staff.**
- 5. Initial Operational Plans for: a) opening ceremony for the Mosby Museum under the direction of SMHS; b) Business Plan and Marketing Plan reviewed, endorsed, and beginning execution steps e.g. staffing, hours of operation, etc.**
- 6. A number of meetings with community organizations needs to be planned: Fauquier Historical Society; Old Jail Museum Executive Director; Old Town merchants, Partnership for Warrenton; History Department faculty at Fauquier County High Schools and Lord Fairfax Community College**
- 7. A reception needs to be planned for past major donors to the Mosby Museum Foundation.**
- 8. A meeting needs to be scheduled/facilitated by Robert Dyer with the SMHS officials and the George Washington University Museum Studies Program; similar arrangements to be made with George Mason, Shenandoah, and Mary Washington Universities.**
- 9. Meetings need to be scheduled with historic groups in the area: Mosby Heritage Area Association, Journey Through Hallowed Ground, Civil War Trust, and others.**

Attachment C -- Important Reference for Task Force Work



A generational shift is occurring at historic house museums as board members and volunteers retire while few young people step forward to take their place.

These landmarks are also plagued by serious deferred maintenance, and many have no endowment funds.

What will happen to these sites in the next ten years, and what can be done to assure their continued preservation for generations to come?

In New Solutions for House Museums, Donna Ann Harris Harris examines possible options and provides a decision-making methodology as well as a dozen case studies of house museums that have made a successful transition to a new owner or user.

- See more at: <http://resource.aaslh.org/view/new-solutions-for-house-museums-ensuring-the-long-term-preservation-of-americas-historic-houses/#sthash.duf73wdk.dpuf>

New York: Rowman and Littlefield Publishers, 2007

Attachment D -- Town Attorney's list of Conditions for Brentmoor

Occupancy and the DHR Easement

Draft Bullet Points of Restrictions on Mosby House

(Not final and may not be used in any contract for the sale of property)

- The property cannot be changed (inside and out) from the photographs taken by Calder Loth of DHR on June 27, 2000 and whose negatives are stored with DHR. The premises may be changed only according to the easement document.
- The property shall only have on it:
 - The house
 - The smokehouse and kitchen outbuildings
 - *Other buildings or structures commonly or appropriately incidental to a single-family residence*
 - Reconstruction of historic buildings or structures where they can be documented as previously existing
 - Any building as shown on the Master Plan of May 5, 2000
 - The Visitor Center
 - Other buildings or structures necessary for the use of the Easement Property as a local history museum
- The smokehouse and kitchen outbuildings can not be altered, restored, renovated, or extended without prior written approval
- Any historical interior characteristics can not be altered or removed without written approval
- The grounds can not be disturbed without prior written approval and must have a plan submitted by a professional archeologist and any artifacts must be preserved
- The topography of the property can not be altered
- Landscaping must be done in accordance with sound arboreal and horticultural practices
- No driveways, roads or utility lines may be created without prior written approval
- One subdivision is permitted provided that neither parcel is smaller than 1 acre and one parcel shall contain the historic house and surrounding grounds and shall be in configuration acceptable to DHR
- Grantee may enter the property from time to time with 10 written notice for the purpose of enforcing the easement and may erect a sign stating DHR has an easement
- Prior to selling the property the owner must notify DHR in writing
- If the easement is violated DHR can restore the property to the condition of the photographs and asses the costs for doing it as a lien on the property
- If the owner submits a written request to DHR and DHR doesn't respond within 30 days then it is deemed to have approved the request

Attachment E -- The Tax Assessment

Good afternoon all. One of the items on my to-do list was to find out the assessed valuation of the Brentmoor House and property. Unfortunately, because it is on the same 3.0553-acre parcel as the Visitors Center, the building values are combined on the County GIS (attached). The combined value is \$747,400 for Improvements and \$373,600 for the Land for a total of \$1.121 million.

I am working on the other items/inquiries and will distribute them to the Work Group as soon as I complete them. Let me know if you have any questions.

Brannon Godfrey

Town Manager

Town of Warrenton

P.O. Drawer 341

Warrenton, Virginia 20188-0341

(540) 347-1101



Parcel Detail for PIN 6984 53 4158 000

Street Address: 173 MAIN ST
Legal Description: 100 BLK OF MAIN ST

Current Assessment Summary

Improvements Value	Land Value	Deferment	Total Taxable Value
\$747,400	\$373,600	\$0	\$1,121,000

Parcel Improvements Land Transfers

Owners :	WARRENTON TOWN OF	Mailing Address :	PO DRAWER 341 WARRENTON, VA 20188 0341
Subdivision :		Neighborhood :	
Map Sheet :	6984 15	Neighborhood Group :	0006
Landscape :	AVERAGE	Tax District :	CENTER-WARRENTON
Road Type :	PAVED	Class :	WARRENTON-TOWN
Topography :	ON GRADE	Acreage :	3.0553
Book/Page & Instrument :	830/1D5ED	Utilities :	PUBLIC WATER PUBLIC SEWER
Ancestors :		Zoning :	RESIDENTIAL
		Decedents :	

Transfer Notes : 91-1/3 INT FR EANDERSON D8 645-1371 91-1/3 INT FR FSHEPHERD D8 645-1419 1998-ACREAGE AMT WAS PUT IN SQ FT BY MISTAKE 1999-FR BROWN,NANCY N & KOVALLYNNE S & SHEPHERD CHARLES E III DB 822/386 2000-FR SHEPHERD CHARLES E III A. KOVALLYNNE S - DB 830/1 2002-CP SP ESMT (PRE-SERVATION ESMT) CONV TO BOARD OF HISTORIC RE-SOURCES - DB 903/1437 2002-D/CORR RECD TO ADD EXHIBIT B TO 903/1437- DB 505/32

Land Conservation Easement Summary

Purchase of Development Rights	County of Fauquier	Open Space Easement	Other
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Attachment F -- Exchange of Communications on Zoning Determinations

Ed,

The current use group of the house is A-3, which is assembly use. The current use of the visitor's center building (33 N. Calhoun Street) is a combination of A-3 assembly use and B - business use. The occupancy load for the Mosby House is limited to 49 persons under the assembly usage. The Building Official would be able to assist with the evaluation of any necessary code updates for restrooms, etc, but it would appear that both structures have the same A-3 assembly use that would not appear to trigger any change of use processes. That said, the Certificate of Occupancy is specific to the uses per floor for the exhibits, storage and offices and that would need to be updated for a change to a visitor's center use.

Thank you,

Sarah

From: Ed Wright [mailto:ebw@wright-realty.com]
Sent: Monday, December 07, 2015 1:03 PM
To: Brannon Godfrey; Sarah Sitterle
Cc: Yak Lubowsky; Yakir Lubowsky; whitsonrobinson; Mitch Oldham
Subject: RE: Uses allowed in Brentmoor House and Property

Thank you Sarah

So, clearly a change of use would trigger improvement costs. What is the current use group of the house and would using it as a visitors center be considered a change of use?

Best regards

From: Ed Wright [mailto:ebw@wright-realty.com]
Sent: Thursday, December 03, 2015 6:19 PM
To: Brannon Godfrey
Cc: Mitch Oldham
Subject: Uses allowed in Brentmoor House and Property

Brannon

Any news from the town regarding alternative uses other than museum and potential change of use issues?

Best regards

Ed

Edward Barron Wright III

Wright Realty, Inc.

9009 Sudley Rd

Manassas VA 20110

703 368 8136 ph

703 282 2372 cell

703 368 7238 fax

Wrightrealty5@gmail.com

Properties for sale or lease can be found here. www.wright-realty.com

REAL ESTATE DISCLAIMER: Content of this email may not be deemed an offer, or acceptance until paper documents are mutually executed. Information deemed but not guaranteed to be accurate.

From: Brannon Godfrey [mailto:bgodfrey@warrentonva.gov]

Sent: Monday, November 30, 2015 4:42 PM

To: yakir lubowsky <councilmanward3@hotmail.com>; Edwardbwright@comcast.net; Terry Nyhous <tnyhous900@aol.com>; brust@ironoxconsulting.com; david.gerrish@wellsfargoadvisors.com;

(540) 347-1101

From: Sarah Sitterle
Sent: Monday, December 07, 2015 12:56 PM
To: Brannon Godfrey
Subject: FW: Uses allowed in Brentmoor House and Property

Mr. Godfrey,

I found the rezoning file for the Mosby House property, which includes the entire parcel. I have attached the minutes from the Council meeting that indicate that text amendments were approved for the PSP District to allow for visitor's centers, gift shops and office use with approval of a SUP. A SUP was granted for operation of a visitor's center at 173 Main Street, which at the time only had the Mosby House and not the separate visitor's center building. That means that a visitor's center could operate at the Mosby House.

For the question regarding an Art Gallery, we do not have that specific use in any district and it is not defined in the Ordinance. An art gallery is usually related to a retail function where artwork is offered for sale and therefore would be considered retail use. Anything open for just display of artwork would be akin to a museum.

Approval for a gift shop SUP was granted for 173 Main Street. This is a very specific use that is defined in the Ordinance and may not be considered general retail.

"Gift Shop: A building, or area within a building, comprising no more than 3,000 square feet that display and sells merchandise at retail that is related to a historic person, place or event."

The house would need to be brought up to code for a change of use. At minimum, that would involve restroom facilities that would need to be ADA compliant. The first level is handicap accessible to my knowledge. Whether the improvements would involve one or two bathrooms, that would be up to the Building Official depending on the occupancy and anticipated use. It is difficult to know what other code changes would be necessary without knowing the end use. The Building Official can be consulted with a walk through to help determine what changes may be necessary.

Thank you,

Sarah

From: Ed Wright [mailto:ebw@wright-realty.com]
Sent: Monday, December 07, 2015 8:20 AM
To: Brannon Godfrey
Cc: Mitch Oldham; Yak Lubowsky; Sarah Sitterle; whitsonrobinson; Yakir Lubowsky
Subject: RE: Uses allowed in Brentmoor House and Property

Thank you.

I see visitor center requires an SUP. Does the current SUP at Brentmoor allow visitor center to be moved to the house?

Would an Art Gallery be allowed? It does not appear so from the zoning.

Also ask if the use of the house changed from museum to office use, visitors center or art gallery, would this change of use trigger construction improvements (ie more bathrooms, ada improvements) to allow each of these uses or could it be used for these uses in its current condition.

Best regards

Ed

Edward Barron Wright III

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Properties for sale or lease can be found here. www.wright-realty.com

REAL ESTATE DISCLAIMER: Content of this email may not be deemed an offer, or acceptance until paper documents are mutually executed. Information deemed but not guaranteed to be accurate.

From: Brannon Godfrey [mailto:bgodfrey@warrentonva.gov]
Sent: Monday, December 07, 2015 8:11 AM
To: Ed Wright <ebw@wright-realty.com>
Cc: Mitch Oldham <mitch_oldham@hotmail.com>; Yak Lubowsky <councilmanward3@hotmail.com>; Sarah Sitterle <ssitterle@warrentonva.gov>; whitsonrobinson <whitsonrobinson@gmail.com>; Yakir Lubowsky <ylubowsky@warrentonva.gov>
Subject: RE: Uses allowed in Brentmoor House and Property

Good morning Ed. I am attaching a the information from the Zoning Ordinance on the Public-Semi-Public (PSP) Institutional District, in which Brentmoor and the Visitors Center reside. I will be meeting with Planning Director Sarah Sitterle and Town Attorney Whit Robinson this morning about what further restrictions may be attached to the property. I am dedicating some time to this later today and will forward you my findings.

PSP is a fairly *unrestrictive* zone, as zoning districts go. Therefore answering the follow-up question about what processes or improvements would be necessary for alternative uses will be challenging. It's a pretty big universe of permitted uses (institutional, retail, office, residential, health).

I hope this is enough to get started. Let me know if you have questions.

Brannon Godfrey

Town Manager

Town of Warrenton

P.O. Drawer 341

Warrenton, Virginia 20188-0341

(540) 347-1101

From: Ed Wright [mailto:ebw@wright-realty.com]
Sent: Thursday, December 03, 2015 6:28 PM
To: Brannon Godfrey
Cc: Mitch Oldham
Subject: RE: Uses allowed in Brentmoor House and Property

Thanks. Need that info to start the analysis due 12/17. If I get it early next week, that works.

Best regards

Ed

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From: Brannon Godfrey [mailto:bgodfrey@warrentonva.gov]

Sent: Thursday, December 03, 2015 6:28 PM

To: Ed Wright <ebw@wright-realty.com>

Cc: Mitch Oldham <mitch_oldham@hotmail.com>

Subject: RE: Uses allowed in Brentmoor House and Property

Good evening Ed. I have not had much time since Monday to work on that subject. I have dedicated time tomorrow morning to work on it, and plan to have some responses on my "homework" items next week.

Brannon Godfrey

Town Manager

Town of Warrenton

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Warrenton, Virginia 20188-0341

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Attachment G

Toward the Concept of Multi-Use Purposes for Brentmoor: Mosby, Warrenton/Fauquier and Horses

Introduction

It is not hard to create an argument that having Brentmoor exclusively as a historic home dedicated to the life of Col. John Mosby is not sustainable in the long run. Many of the recent articles and books about historic homes speak about their decline, but also include examples of creative and entrepreneurial models of successful historic homes that shaped their offering to the community and embraced having multiuse facilities, not just a static museum.

A Local Example

A local example is in Gordonsville, Va just 50 miles from Warrenton. The Exchange Hotel (originally an 1860's railroad hotel and tavern) served the purpose of being a Civil War Hospital museum during the Civil War as a large scale receiving hospital for injured Confederate and Union troops. To this day it has perhaps the best collection on display of War medical instruments and supplies.

Overtime, the story of The Exchange Hotel being a Civil War hospital and its fine collection of artifacts was a strong, but perhaps not a compelling reason for a historical tourist to visit out-of-the-way Gordonsville. Originally a hotel and tavern for railroad passengers, the first floor of the home depicts the tavern and guest rooms. The second floor is largely devoted to the building's hospital role. The top floor shows how the hotel was used after the War as a Freedmen's Bureau offering an education center for emancipated slaves. It also served as a small claims court for freed slaves. Another role depicted in the home was its home for the spy agency of the Confederacy. This is a clear example of Museum multiple uses. It shows the changing role of the hotel over time and created multiple reasons for a visit.

MultiUse for Brentmoor?

What kind of multiuse might fit Brentmoor? Clearly, its anchor purpose should be the home of the Mosby Museum, as Mosby resided in Warrenton after the War. The three phases of his life to depict here are Mosby as a Cavalry officer, as a town attorney and family man, and as a Federal employee and statesman. Perhaps the Museum should spend at least a third of their exhibit content on each of these topics? What other historical uses might Brentmoor have? One is highlighted below, others can emerge.

A direct link exists between Mosby, his Rangers, and equestrian activities. One book tells of Mosby allowing his Rangers to take a day off to participate in point-to-point races in Upperville. Mosby himself is said to have been a foxhunting participant during the War. Much has been written about the importance of horses in war, in general, and the role that they had in the Civil War. There is speculation that the Confederacy's early battlefield success could be attributed to a superior cadre of military leaders and the edge they had with their cavalry units connected to horsemanship. Mosby looked at numerous factors when selecting his Ranger recruits and riding skills was very high on the list.

So how does this tie to the Mosby museum? There could be special exhibits that link to horses and horsemanship, some directly tying to the Civil War years and some more generally linking to Warrenton and Fauquier County with their major legacies when it comes to the subject of horses. The past could be linked to the present. Below some of these horse centric ties are spelled out.

1. Steeplechase or Point-to-Point racing is big in Fauquier County. Gold Cup's headquarters are located here and the Great Meadows, a major equestrian center, is located 5 miles out of Town. A U.S. equestrian training center is in the works on the Arundel property.

An exhibit about the history of the Gold Cup Races and its present racing innovations might fit well.

2. The story of President Theodore Roosevelt's one day ride to Warrenton from Ft. Myer is etched in the Town's history. Roosevelt had supported a policy that a cavalryman should be able to ride 90 miles in a day. On Jan. 13, 1909 Roosevelt staged a publicity stunt to prove the reality of the policy.

A 50 mile ride with stops at Fairfax and Gainesville for fresh mounts brought Teddy to the Town at 11 am. He had left Ft. Myer at 3:40 am. After a speaking and handshaking opportunity on the lawn at the Warren Green hotel, Roosevelt had lunch, he then began the return trip and was back in the White House at 8:30 pm. **How about reenacting this famous ride in Old Town and have an exhibit about it and the equestrian background of the famous Roughrider?**

3. A similar famous ride was performed by Col. Mosby and his men after he captured Union General Staunton in Fairfax and took his captive and other prisoners to Warrenton by horseback. Mosby gave permission to Staunton to visit his Beckham family friends on Culpepper Street. March 9, 1861, the date of this ride, was chosen to be the date of the Grand Reopening of the Mosby Museum in 2013. This daring evening raid was a major part of the origin of the legend of the Grey Ghost of the Confederacy. **More reenactment possibilities.**
4. Horse Country located in Warrenton's Old Town is the area's largest retail operation focused on riding gear, apparel, and tack. Publisher of Horse Country Life. **Could Horse Country sponsor a tour of their shop and lead a display of tack and riding apparel over the years?**
5. Several of the Piedmont region's oldest fox hunting clubs are in the immediate area – Warrenton Hunt, Old Dominion Hounds, and the Casanova Hunt. Each of the clubs run their own Steeple Chase races in the spring using area venues such Buckland Farms and the fields proximate to Airlie. **Each Club or working cooperatively could have visitors come to a fox hunt to experience its beauty, traditions, and riding skills. This would be followed by a short presentation at Brentmoor on the history of foxhunting and the history of hunt clubs in the Warrenton area .**
6. The White Sulphur Springs, now the location of the Fauquier Springs Country Club, was a major spa during the early 1800's with a large hotel with 400 person capacity and numerous cottages (16) including the Monroe House, a massive ballroom facility (4,000 sq. ft.), and a venue for fox hunting and horse racing. It was a place where the elite went to vacation and party. Presidents Monroe, Madison, and Van Buren vacationed her along with Chief Justice John Marshall. The Springs is also the site of the drafting of the Dredd Scott Decision. **Visiting FSCC could be arranged followed by a photo display and showing of Springs artifacts at Brentmoor.**

7. Warrenton's Horse Show grounds, well within the Town limits, is the nation's oldest in-town horse event facility. It began in 1899. **Why not have a program about the history of the Horse Show grounds and some of its famous visitors, e.g. country and western singer Patsy Cline?**
8. Both Mosby's Rangers and the Black Horse Cavalry unit fought numerous battles in-and-around Fauquier County and Warrenton. A reenactment could take place on the grounds of Brentmoor. **Excellent opportunity to have a special Rangers program, like the significance of Virginia Military Institute students as Rangers.**

A few contacts have been made with individuals well-known to the Town's equestrian scene and these contacts are supportive of working with Brentmoor and the Mosby museum for potential exhibits or speaker programs.

Articles and Websites portraying Warrenton and Horses as an Additional Theme for Brentmoor

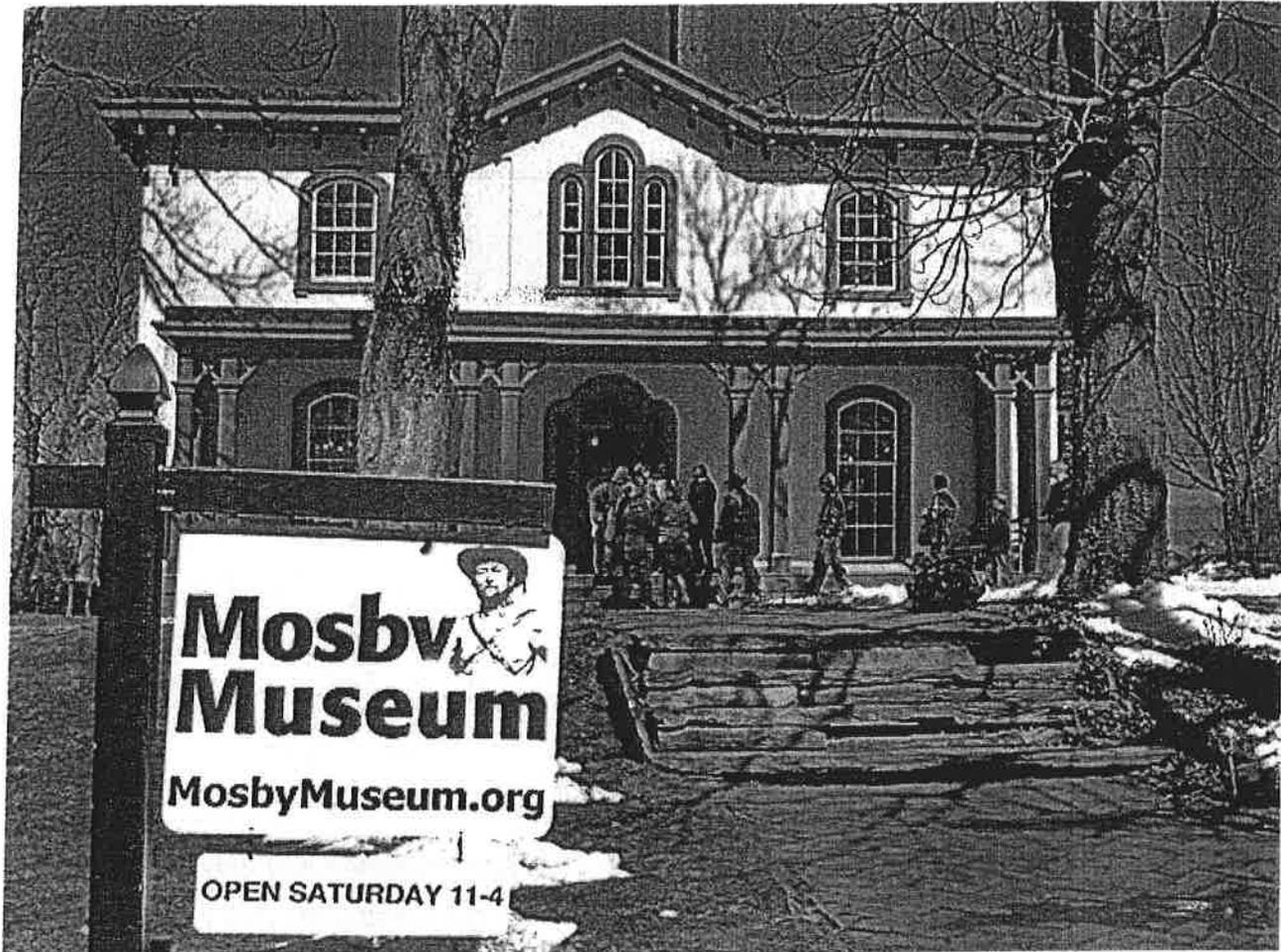
1. White Sulphur Springs – a Place for the Ages--<http://www.fauquiersprings.com/history/white-sulphur-springs>
2. Virginia Gold Cup Races-History--<https://www.vagoldcup.com/va/history>
3. Warrenton Horse Show History --
<http://www.warrentonhorseshow.com/horseShow.cfm?action=history>
4. Old Dominion Hounds--<http://old-dominion-hounds.com/wp/about-odh-2/>
5. Horse Country Life (publication and retail)-- <http://www.horsecountrylife.com/intro.html>
6. Short piece that attests to the importance of riding skills to the Rangers--<http://www.stuart-mosby.com/mosby-rangers>
7. Horses in warfare--https://en.wikipedia.org/wiki/Horses_in_warfare
8. The Horse in the Civil War--http://www.reillysbattery.org/Newsletter/Jul00/deborah_grace.htm
9. The Black Horse Cavalry and Fauquier County --
<http://www.blackhorsecavalry.org/files/Black%20Horse%20Talk.pdf>
10. The Debate over Historic Homes—
11. Man, Myth, Teddy—100 mile commute to Warrenton.
http://www.fauquier.com/news/article/man._myth_teddy_in_1909_president_roosevelt_com_muted_100_miles_to_warrenton

Attachment H -- Exterior and Interior Views of Brentmoor

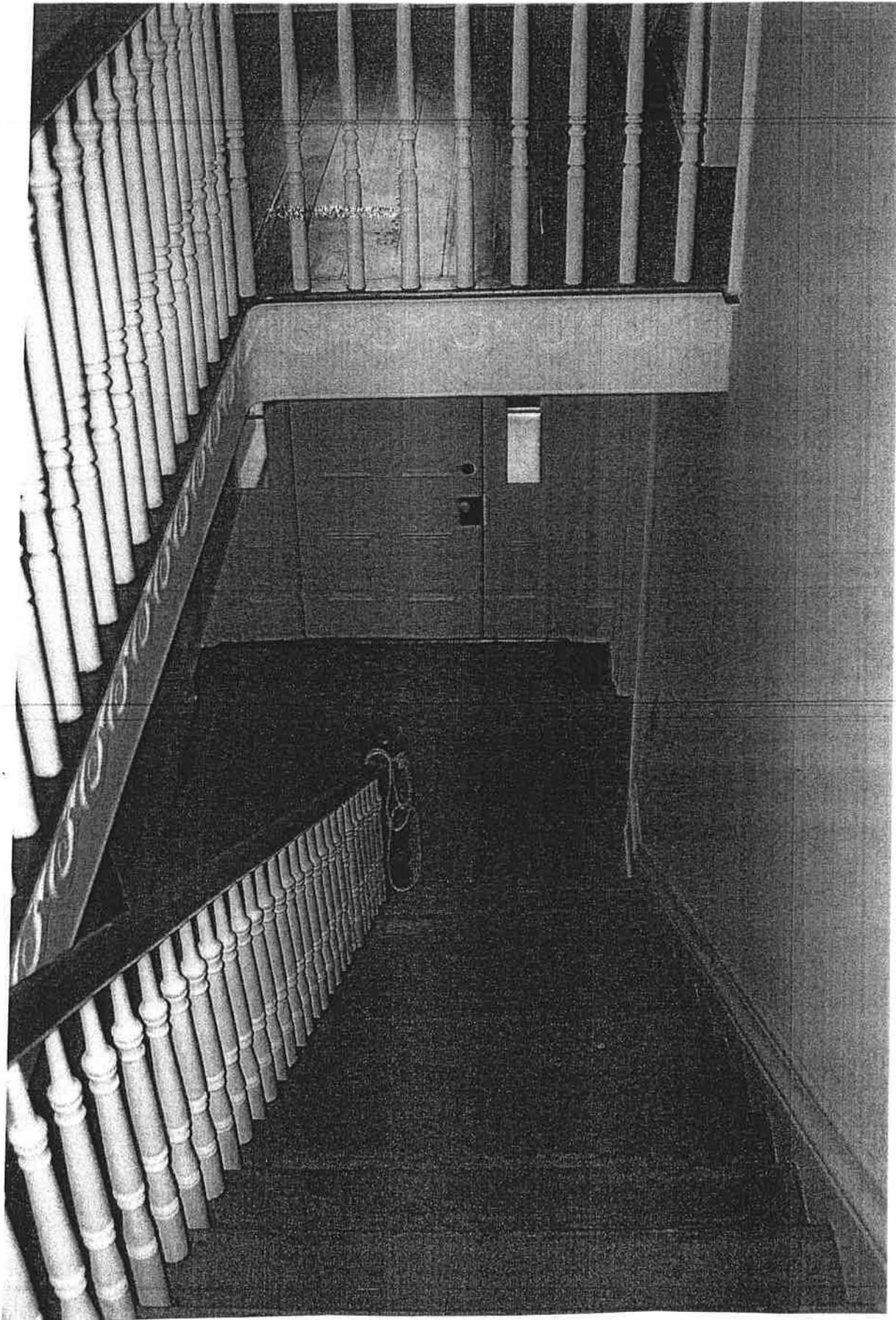
The Present-Day Mosby House

Brentmoor, also known as the Spilman-Mosby House or, more simply, the Mosby House, is a symmetrical ~~four-over-four~~ Italianate villa style house built in 1859 and refurbished with well over a million dollars in renovation and improvements over the course of nearly a decade spanning the years 1999 to 2007. A geothermal heating and cooling system, as well as a modern security system, were installed as part of the renovation. The four fireplaces were made ineffective, although they maintain their aesthetics.

In an effort to remain faithful to the original design, modern plumbing was stripped from the house, with the exception of a lone toilet in the basement. The attached kitchen was also removed as part of an effort to return the house to the way it looked in the 1859-80 period, reflecting the lives of the four prominent families who lived there during that time.



View of Mosby Home and Museum Sign from Main Street



Staircase from 2nd Floor to Main level of Brentmoor



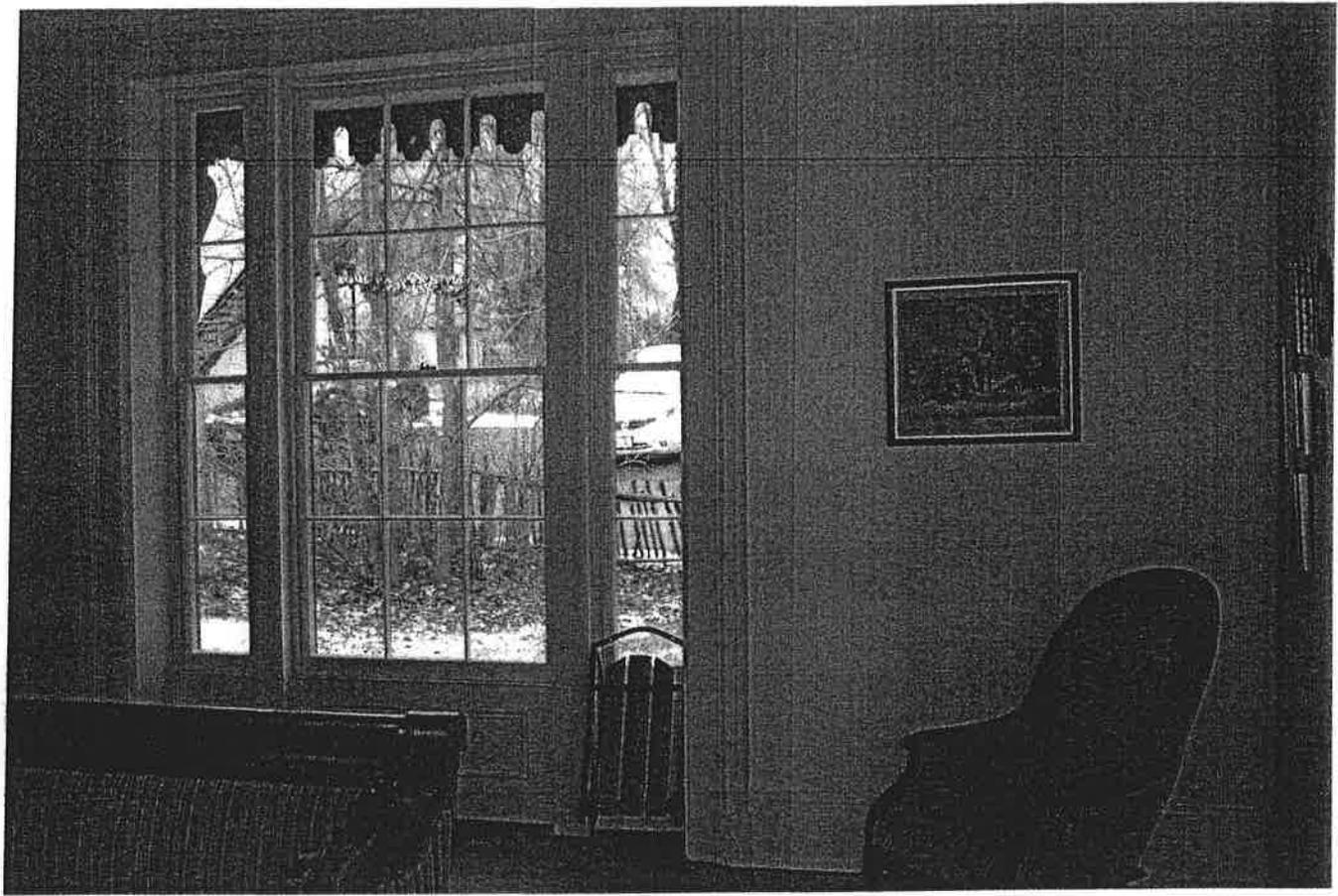
Mosby Artifacts Displayed in Secure Glass Casing (Room at rear of Main Level)



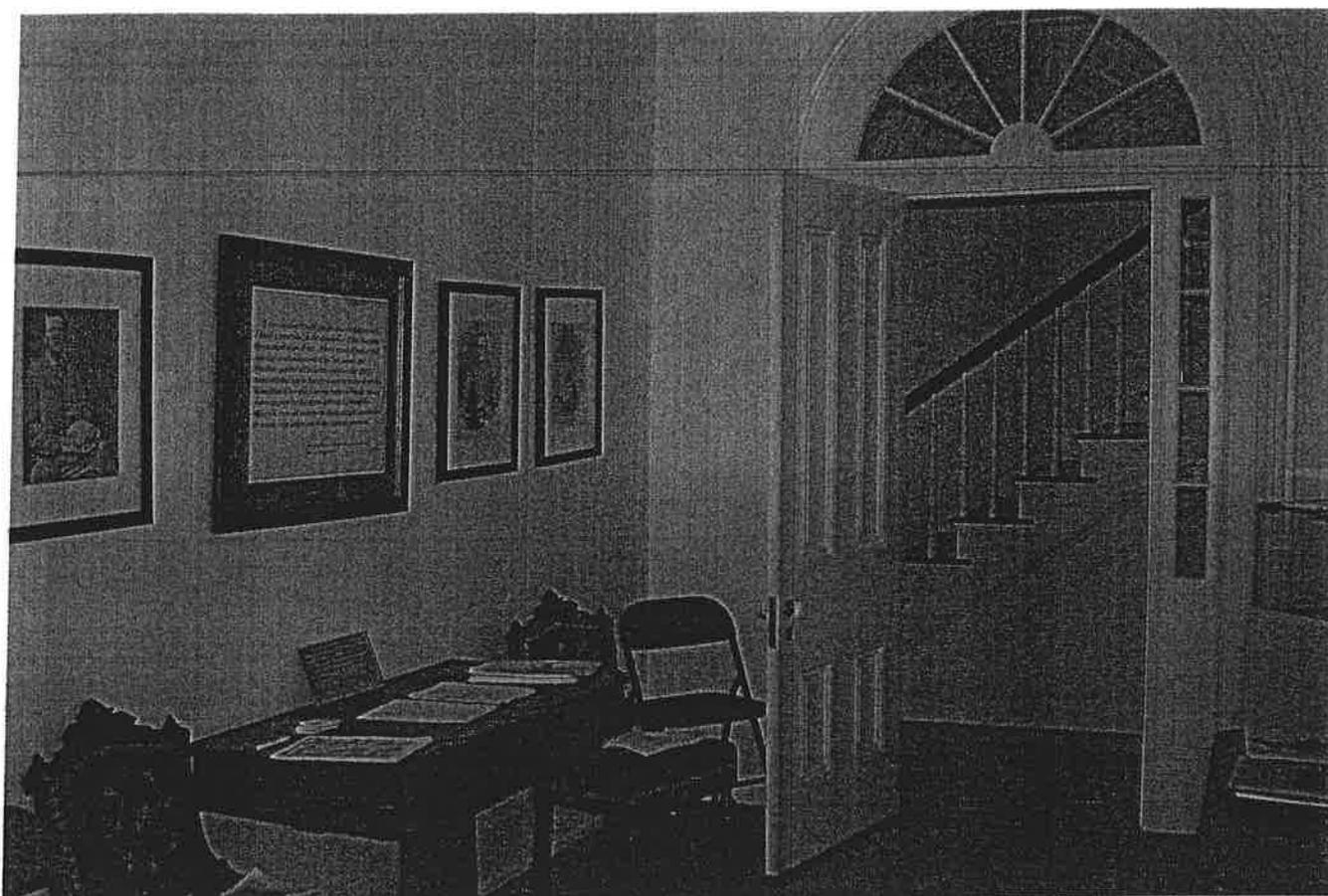
Fireplace in Col. Mosby's Office –Front/Main Street Facing Room



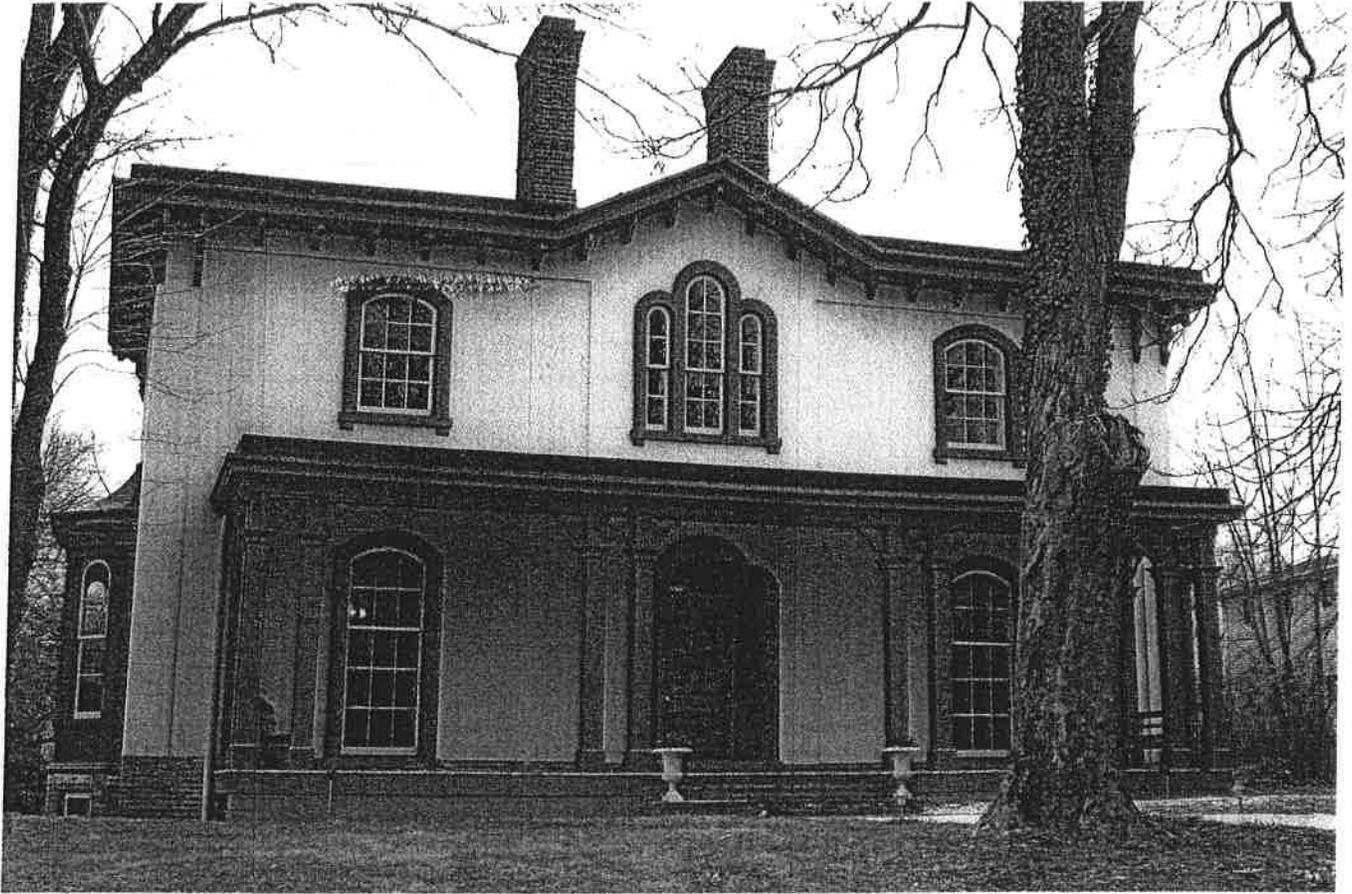
Pauline Mosby's Parlor/Sitting Room – Front/Main Street Facing Room



Pauline Mosby's Parlor/Sitting Room – Front/Main Street Facing Room



Artifacts Displayed on Wall in Front Entry Hallway



Front View of Brentmoor



Rear View of Brentmoor



Stuart-Mosby Historical Society

2

SMHS BUSINESS/DEVELOPMENT PLAN OUTLINE FOR BRENTMOOR (DRAFT – 1/22/2016)

INTRODUCTION

The Stuart-Mosby Historical Society operates a small non-profit museum, library and headquarters for the Society in Centreville, Virginia. The Society currently leases a building and operates the Stuart-Mosby Civil War Cavalry Museum, which is open to the public three (3) days per week (Saturday-Sunday-Monday) and offers tours of artifacts and displays related to the legacies of Major General J.E.B. Stuart and Colonel John Singleton Mosby.

The Society currently seeks to expand this enterprise by acquiring access and use as the administrating organization at Brentmoor, Colonel Mosby's post-war home in Warrenton, Virginia, and operate two museums in Northern Virginia. Following is a plan to accomplish that goal.

1. WHO WE ARE, OUR PURPOSE AND GOALS

The Stuart-Mosby Historical Society is a non-profit, 501(c)(3) organization founded in 1983 by Adele H. Mitchell, an Army wife stationed at Carlisle Barracks (the original U.S. Army Cavalry School) to perpetuate the memory of Stuart and Mosby and educate the public about their great accomplishments and often brilliant military deeds.

A number of prominent persons interested in history, predominantly in Richmond, Northern Virginia and Pennsylvania, were involved in the founding of the Society. While the organization includes many descendants of General Stuart, Colonel Mosby and their men, membership is open to all. At last count the Society had more than 125 members from all over the United States and some European countries. The organization includes many members of other historical groups, including the Mosby Heritage Area Association, Fauquier County Historical Society and the Fairfax County Historical Society, as well as the Sons of Confederate Veterans, United Daughters of the Confederacy, Military Order of the Stars & Bars and many others.

Except for the Newsletter Editor, the Society's current officers are all located in Northern Virginia. For the period beginning July 2015 and running through June 2017, the officers include President Ben Trittipoe (Leesburg), Vice President Eric Buckland (Centreville), Secretary David Goetz (Warrenton) and Treasurer Janet Greentree (Burke). The Newsletter Editor, Valerie Protopapas, resides

on Long Island in New York.

The current Board of Directors consists of six members with terms running from July 2014 to June 2016. They include Richard Crouch (Arlington), Tom Evans (Reston), Don Hakenson (Alexandria), John Mosby Russell (Bethesda, Maryland), John Ward (Aldie) and Gwen Wyttenbach (Annandale). An Executive Board of the Society's past presidents also provides advice and guidance to the President.

The Society has a collection of renowned artifacts, including many that have been donated by family members of Stuart, Mosby and the men who served with them. Most of the manuscripts are on temporary loan to the Virginia Historical Society Library and the rest of the collection, and other manuscripts, are being kept in secure storage at our museum facility.

2. COLLECTION, MUSEUM PLANS

The Stuart-Mosby Civil War Cavalry Museum, located at 13938 Braddock Road in Centreville, Virginia, is housed in a small building leased to the Society at a nominal annual rate (\$1 per year, plus cost of insurance policy and security system, both of which is paid by a supporter of the museum) by member Dennis Hogge of Centreville. This location is a combined Society headquarters, library and museum.

Thanks to the vision and dedication of the late Howard Crouch (the original curator), his brother Richard Crouch and current co-curators Don Hakenson and John Ward, the Stuart-Mosby Civil War Cavalry Museum has become a successful operation. Since its opening for Centreville Days in October 2011, the museum has welcomed more than 2,000 visitors from across the United States and around the world.

The Stuart-Mosby Civil War Cavalry Museum is currently open to the public three (3) days per week (Saturday-Sunday-Monday) and does not charge an admission fee. Donations, collected in a cavalry boot, are "suggested" to anyone who visits.

Many Society members have been closely involved with the growth and development of the Museum of the Confederacy, the Virginia Historical Society Museum, the Loudoun Museum, the Fairfax Museum and the Manassas Historical Museum, Sully Plantation, the Herndon Museum and the museum exhibit at Frying Pan Farm Park. Many members have extensive experience in dealing with state and local governments on preservation issues. The Society has no employees, and all who serve the organization are volunteers.

An impressive collection of Confederate Cavalry material has been donated by various members of the Society. Included among the prized artifacts are a pistol worn by Col. Mosby during the war, a sword presented to Gen. Stuart weeks before he was mortally wounded, and busts of the two icons cast from the original Valentine molds.

The Society received a special award from the National Society of the Daughters of the American Revolution for founding the Stuart-Mosby Civil War Cavalry Museum and for Excellence in Community Service. The museum has also been recognized as one of the Top 10 Historic Sites to visit in Fairfax County, Virginia. The curators and docents (all volunteers) are considered experts in the field.

Due to the Society's ever-expanding collection of historical artifacts, it has become necessary to expand. We envision Brentmoor as the Society's new headquarters with the ability to add more visibility to the collection along with the current facility in Centreville. We also plan to rotate exhibits between the two venues to increase the flow of visitors at each location.

The Society wishes to make some of our research material available to researchers in Centreville and in Warrenton, and open both museums to the public.

3. ADMINISTRATION OF THE PROPERTY

The Stuart-Mosby Historical Society proposes to reopen Brentmoor as a functioning museum

relating to John Singleton Mosby, who owned the property following the War Between the States. Both the main floor and upper floor of the building would be utilized to house the museum, gift shop, reference library and Society offices.

Artifacts from Mosby's pre-war years, his years during the conflict and his post-war years (promoting peace and reconciliation) would be displayed and interpreted to visitors. Additional artifacts relating to Mosby's Rangers (his war-time command) and to Brigadier General Eppa Hunton, who owned the property after Mosby, could additionally be displayed.

The current collection of artifacts housed at Brentmoor would be conveyed in a loan by the Town of Warrenton to the Society, and the Society would add artifacts in its possession to enhance the enlightenment of visitors.

The Society would plan to open the museum at Brentmoor three (3) days per week (Saturday-Sunday-Monday) to begin operations. As the museum proves more popular and grows in demand, additional open days would be added. In addition, if a large group (from a school, historical group, etc.) should request a tour on a day the museum would generally be closed, arrangements would be made to provide a special opening.

Parking and restrooms would be accessible at the nearby Town of Warrenton/Fauquier County Visitors Center. The large meeting room on the lower level of the Visitors Center would also be available for potential use for lectures when the Society should host major events.

To immediately satisfy having drinking water in Brentmoor, the Society would undertake the cost of placing a minimum of two (2) office-style water coolers inside the building – one on each floor.

4. FUNDING

The Society's cash on hand at any particular time is roughly \$5,000 in the checking account and approximately \$40,000 in a savings account that is targeted for another preservation effort. The figures fluctuate, of course, with the incoming dues at renewal time and with future expenditures.

Should the Society be able to acquire the rights to administer Brentmoor, Mr. John Mosby Russell (a current member of the Society's Board of Directors) will donate \$25,000 to begin operations.

The Society will solicit other significant donations upon the guarantee of gaining such rights. Mr. Russell has agreed to donate up to an additional \$75,000, in increments of \$25,000, as the Society raises matching funds.

A. Regular Income

The Society's regular income (dues and donations) would be enhanced by visitor donations, fees for guided tours, fees for attending proposed educational seminars, book and gift sales and other potential rentals of the facility.

B. Donations

The Society has had significant benefactors over the years, assisting in the success of the museum in Centreville as well as other preservation projects. We believe members and other community supporters will step forward to assist the Society in operating two separate functioning museums.

The Society will solicit additional donations from our membership, and we plan to approach other historical associations to develop future partnerships. We plan to apply for government grants and those offered by philanthropic organizations. We have had the benefit and support of local government officials in the past and we anticipate that will continue in Warrenton and Fauquier County.

C. Museum Admissions

The Society plans no admission fee for those visitors interested in a self-guided tour of the museum, but would "suggest" a donation. Guided tours for larger groups will be conducted for a fee of \$5 for adults, \$3 for school-age children and Senior Citizens. Special rates and arrangements for larger groups would be determined at a later date.

D. Education – Seminars/Events

The Society intends to contact the George Washington University Department of Museum Studies to assist in planning, developing and enhancing the museum experience at Brentmoor. The Society would encourage input from the department's students through class projects and internships. This association could provide guidance as the museum develops and also encourage new membership in the Society.

The Society also plans to consult with other preservation groups, including the National Trust for Historic Preservation, to utilize their expertise in making historic properties successful and profitable.

The Society plans to hold an annual seminar on counter-insurgency, highlighting Mosby's unique use of guerrilla warfare tactics. This annual seminar would seek to draw experts in the field to discuss and analyze such tactics from all facets of U.S. military history, from the Colonial era to the present day.

The Society also plans to offer an annual seminar on Mosby and his men, highlighting the life of the charismatic Mosby both during and after the War Between the States. Included would be stories of the battlefield exploits of his command and the men who made him famous.

The Society plans to offer periodic events where local groups can utilize the property to tell the tales of family and community life in the era of the War Between the States. Living history displays could be enacted both inside and outside of Brentmoor, including events featuring the Gray Ghost Interpretive Group of the Mosby Heritage Area Association.

When hosting a major event, the Society would potentially request use of the large meeting room on the lower level of the Visitors Center. The major events also could potentially be held in a large tent on the grounds of Brentmoor.

E. Sale of Imprint Goods/Gift Shop Sales

A gift shop, located in a room near the main entrance, would be established at Brentmoor in order to increase profits in this endeavor. It will contain books authored by Society members and local historians, as well as items such as shirts, tote bags, coffee mugs, caps and other pertinent merchandise.

The primary purpose of having a gift shop would be to make the museum more attractive, especially to tourists and to the target audience. The entrance and gift shop will also include a donation box.

5. EXPENSES

The Society expects to incur expenses related to operating the museum. These include:

A. Property Lease

The Society intends to enter into a reasonable lease for the duration of five (5) years with the Town of Warrenton for the purpose of handling the administration of the property and facilities at Brentmoor. The amount of the lease is to be negotiated between the two parties and will contain an option to renew at the conclusion of the term.

The lease would include payment of utilities, payment for insurance and a security system, maintenance of the grounds as well as the interior and exterior of the building, garbage removal and other items to be negotiated. The lease would also include a provision for a specific number of events (to be negotiated) per calendar year allowed on the property grounds, both inside and out.

B. Insurance & Security System

The costs for a fire suppressant system, a security system and for insurance on the property and the on-premises collection of artifacts will be negotiated as part of the full lease agreement.

A waterless fire suppressant system would be preferred to protect the building. A security system placed on outer doors and windows (as already exists at the Centreville museum) is a necessity due to the value of the collection to be housed at Brentmoor.

The Society currently holds an insurance policy on the artifacts located in the museum in Centreville valued at \$360,000. A similar policy, or the expansion of the current policy, will be pursued in regards to the collection at Brentmoor.

C. Advertising

The Society would produce a full-color brochure providing information, including directions to the locations and details on the collections, regarding both museums. This brochure will serve a dual purpose of promoting both museums. The brochure would be distributed to schools in Fauquier, Fairfax, Loudoun and Prince William counties, as well as to other historic sites (Manassas National Battlefield Park, I-66 Visitor Center in Prince William County, local regional and county park facilities, etc.) to be displayed in order to draw visitors to both venues.

The Society would develop a new website to help promote both museums and the Stuart-Mosby Historical Society. Such development would be outsourced, possibly as a student-led process with an educational partner.

The Society would approach the Fauquier County and Town of Warrenton offices of marketing and planning for assistance in creating joint advertising plans to promote the historical property and how it can benefit the downtown business area of Warrenton.

The Society would also approach the Fauquier Historical Society and see how the two groups could best promote tourism by linking the Old Jail Museum and Brentmoor as anchors for a historic district.

The Society would rely on paid (when necessary) and free advertising (local media announcements and stories) to publicize the museum.

D. Staffing

The staff of curators and docents at the Stuart-Mosby Civil War Cavalry Museum in Centreville are all volunteers. The Society envisions the same sort of staffing initially for the museum at Brentmoor, with the possibility of paid tour guides at a later date as the venture grows more profitable.

The Society plans to explore setting up educational partnerships with a local university (to possibly include Shepherd University and the University of Mary Washington in addition to George Washington University) to provide assistance in museum administration. Internships and fellowships could become part of the staffing plan.

The Society would also extend offers for local high school students to volunteer as researchers, docents, tour guides and "Living History" actors to help fulfill Community Service requirements.

E. Expansion/Additions to Facility

The Society realizes there may be a need for expansion and/or additions to the infrastructure at Brentmoor to accommodate visitors in the regard of restrooms and ADA-compliant measures, including a professionally-produced video/DVD providing what is available on the upper floor of the building.

The Society would expect to negotiate the cost of such additions with the Town of Warrenton as a part of the full lease agreement.

6. CONSULTATION AND LIAISON

The Society intends to consult with other established museums and individuals experienced in this field

for advice and recommendations. We are open to suggestions that will enhance the total museum experience.

- The Stuart - Mosby Historical Society was established well over 35 years ago and has many noted members and authors including Hugh Keen, Horace Mewborn, JEB Stuart III, IV, V, and VI, Don Hakenson, Chuck Mauro, Eric Buckland, Tom Evans, David Goetz. and many other noted Civil War experts in the field of archeology and military accoutrements,

- These distinguished authors have developed, researched, and published various historical manuscripts and books that have won many prestigious awards. All are nationally known and respected Mosby authorities possessing the expertise and talent to tell the complete story of the life and times of Colonel John Singleton Mosby.

- Don Hakenson and Chuck Mauro were recognized for their research and books as "Virginians of the Year" in Northern Virginia, in the July 2015 issue of *Northern Virginia Magazine*. In addition, the Stuart-Mosby Civil War Cavalry Museum in Centreville, Virginia won an award from the Daughters of the American Revolution for Excellence of Community Service.

- The Society has a vast collection of Mosby, Stuart and civil war artifacts and can provide circulating exhibits and programing complimenting the Old Jail museum as historical bookends in the town of Warrenton. Both museums can promote and accentuate each other. The Stuart-Mosby Civil War Cavalry Museum has been in existence since October 2011 and is listed as one of the top ten Civil War attractions in Fairfax County, Virginia.

- They will provide an economic development addition to the Town of Warrenton highlighting a comprehensive Mosby research facility and a top notch award winning museum. The Society could produce periodic Mosby conferences and seminars; leading history, cemetery, and Mosby tours of Warrenton and Fauquier County; with regular revolving displays and artifacts. I personally have greatly benefited from the Mosby related bus tours given by Don Hakenson; going into many and different areas of interest.

- They have a Stuart - Mosby website that has attracted many members from all around the country and even in Europe providing a vital following.

- They have a revenue stream that has raised \$10,000 to rehabilitate the memorial for JEB Stuart at Yellow Tavern and \$40,000 to clean the JEB Stuart Memorial in Richmond that the city had refused to do. Additionally, the Society has published

books concerning Mosby and Stuart that has added to the scholarship of these two great Virginians!

The society is well aware of the kitchen and bathroom limitations and that is workable to them addressing the "con" of the "Lease Brentmoor" slide 2 of the committee's Pro/Con Evaluation.

Attachment J – Deed of Easement for Brentmoor House

01 07012

01 07483

Exempted from recordation taxes
Under the Code of Virginia (1950), as amended,
Section 58.1-811(A)(3) and 58.1-811(C)(3)
And from Clerk's Fees under section 17.1-266

DEED OF EASEMENT

BRENTMOOR (SPILMAN-MOSBY HOUSE)

WARRENTON, FAUQUIER COUNTY

THIS DEED OF EASEMENT, made this 14th day of November, 2000, by the TOWN OF WARRENTON, a political subdivision of the Commonwealth of Virginia, and its successors and assigns, herein collectively called the Grantor, and the COMMONWEALTH OF VIRGINIA, BOARD OF HISTORIC RESOURCES, herein called the Grantee,

WITNESSETH:

WHEREAS, Chapter 22, Title 10.1 of the Code of Virginia of 1950, as amended, was enacted to support the preservation and protection of the Commonwealth of Virginia's significant historic, architectural, archaeological, and cultural sources, and charges the Board of Historic Resources to designate as historic landmarks to be listed in the Virginia Landmarks Register such buildings, structures districts, and sites which it determines to have local, statewide, or national significance, and to receive properties and easements in gross or other interests in properties for the purpose, among other things, of the preservation and protection of such designated landmarks; and

WHEREAS, the "Open-Space Land Act", Chapter 17 of Title 10.1 of the Code of Virginia of 1950, as amended, was enacted to preserve land for historic and other purposes; and

WHEREAS, the Grantor is the owner of a property known as BRENTMOOR, consisting of a tract of land containing 3.0 acres, more or less, herein described which includes a house

vertical w
attach Exhibit
"B"
Examined and
Returned to:
→ Henry Day
JUN 20 2001
AUG JUN 29 2001

which is of historic and architectural significance and is listed on the Virginia Landmarks Register and the National Register of Historic Place; and

WHEREAS, BRENTMOOR is a contributing property in the Warrenton Historic District, which district is also listed on the Virginia Landmarks Register and the National Register of Historic Places; and

WHEREAS, BRENTMOR was acquired by the Grantor for the purpose of establishing it as a local history museum for the benefit of the public; and

WHEREAS, Chapter 1073 of the 2000 Acts of Assembly, Item 571, appropriated \$50,000.00 for BRENTMOOR for the purpose described in Section 10.1-2213 of the Code of Virginia; and

WHEREAS, Section 10.1-2213(B)(4) of the Code of Virginia conditions the award of these funds on the Grantor's donation of a perpetual easement for the purpose of preserving those features of the property which led it to its designation as a historic landmark; and

WHEREAS, the Town Council of the Town of Warrenton, Virginia, held a public hearing to have its November 14, 2000 meeting, upon notice properly and duly given, in compliance with the ordinances of the Town and the Code of Virginia, on the grant of this easement and has duly adopted a resolution authorizing a conveyance contained herein; and

WHEREAS, both the Grantor and the Grantee desire to ensure the preservation of BRENTMOOR and the protection of the historic and architectural features that led it to be placed on such Registers;

NOW THEREFORE, in recognition of the foregoing and in consideration of the sum of Ten Dollars (\$10.00) and other valuable consideration, the receipt of which is hereby acknowledged, the Grantor does hereby grant and convey to the Grantee an easement in gross

and right in perpetuity to restrict as herein provided the use of the property described in "Attachment A" (hereinafter called the Easement Property).

The restrictions hereby imposed on the use of the Easement Property are in accord with the policy of the Commonwealth of Virginia, as set forth in Chapters 22 and 17 of Title 10.1 of the Code of Virginia of 1950, as amended, to preserve the Commonwealth's designated historic landmarks. The acts which the Grantor covenants to do and not to do upon the Easement Property, and the restrictions which the Grantee is hereby entitled to enforce, shall be as follows:

1. The parties agree that the photographs of the Easement Property taken by Calder Loth of the Department of Historic Resources on June 27, 2000 (DHR negative numbers: 17783 and 17784) accurately document the *historic architectural features of the Easement Property*. The negatives of the said photographs shall be stored permanently in the archives of the Department of Historic Resources or its successors. Hereafter, *interior and exterior historic architectural features of the Easement Property shall be maintained and preserved as nearly as practicable, except for changes which are expressly permitted hereunder.*
2. No *building or structure shall be built or maintained on the Easement Property other than (i) the house, (ii) the smokehouse and kitchen outbuildings, (iii) other buildings or structures commonly or appropriately incidental to a single-family residence, (iv) reconstructions of historic outbuildings or structures which are documented through professional historical or archaeological investigation to have been located on the Easement Property, (v) those buildings and structures shown on the MASTER PLAN, dated April 20, 2000 and revised May 5, 2000, prepared by Earth Design Associates, entitled MASTER PLAN, Brentmoor-Spilman Mosby House, John Singleton Mosby*

Foundation, Inc., a copy of which is attached hereto as Attachment "B", hereby incorporated herein, (vi) including, specifically, a visitors center and combined office building as shown on the Master Plan attached as Exhibit "B", not to exceed five thousand (5000) square feet in a two story building, the architectural style and design of which shall be approved by the Grantee, and (vii) other buildings or structures necessary for the use of the Easement Property as a local history museum.

3. The house and the smokehouse and kitchen outbuildings shall not be demolished or removed from the Easement Property, nor shall they be altered, restored, renovated, or extended, except in a way that would be consistent with the Secretary of the Interior's Standards for the Treatment of Historic Properties (Rev. 1992), and provided that the prior written approval of the Grantee to such actions shall have been obtained. Work on the house and smokehouse and kitchen outbuildings as approved by the Grantee pursuant to the *General Assembly appropriation referenced above* is hereby approved for purposes of this Easement. No other permitted building or structure shall be constructed, altered, restored, renovated, or extended except in a way that would, in the opinion of the Grantee be in keeping with the historic and architectural character of the Easement Property, and provided the prior written approval of the Grantee to such actions shall have been obtained. The location and design of any new building or structure is expressly made subject to the prior written approval of the Grantee.
4. *The character-defining historic interior architectural elements* of the house, including mantels, windows, window frames, doors, door frames, stairs, staircases, baseboards, cornices, plasterwork ceiling medallions, floorboards, and hardware shall not be

altered or removed from the Easement Property without the prior written approval of the Grantee.

5. Archaeologically significant deposits, features, or sites on the Easement Property, including the flower garden to the rear of the house, shall not be intentionally disturbed or excavated except by or under the supervision of a professionally qualified archaeologist and provided plans for such archaeological activity have been submitted to the Grantee for review and comment prior to any ground-disturbing activities. Artifacts and objects of antiquity professionally excavated from archaeological sites on the Easement Property shall be treated and preserved according to the Virginia Department of Historic Resources State Curation Standards (March 24, 1998).
6. Grading and earth removal shall not alter the topographic aspect of the Easement Property, except as required in the construction permitted buildings and structures, or for the reconstruction of historic landscape features.
7. Management of trees and vegetation on the Easement Property shall be in accordance with sound arboreal and horticultural practices. Vegetation shall be managed so as to prevent damage to the house and the smokehouse and kitchen outbuildings.
8. The location of any new roads or driveways, or any new utility lines, on the Easement Property (except over existing rights-of-way) shall be subject to the prior written approval of the Grantee.
9. The Grantor shall have the right to subdivide the easement property into two (2) parcels, provided that neither parcel shall be smaller than one (1) acre in size. The subdivision shall create a contiguous parcel containing the historic house and

BK 0905 PG 0037

surrounding grounds and shall be in a configuration reasonably acceptable to Grantee. Except as expressly provided herein, the Easement Property shall not be divided, subdivided, or conveyed in fee other than as a single tract.

10. The Grantee and its representatives may enter the property (i) from time to time, upon 10 days' written notice to the Grantor, for the sole purpose of inspections and enforcement of the terms of the easement granted herein, and (ii) in its discretion, to erect at a location acceptable to the Grantor, a single marker or sign, not exceeding two feet by two feet, which states the name of the Grantee and advises that the Grantee owns the easement granted herein.
11. Prior to any transfer of title to the Easement Property, the Grantor shall notify the Grantee in writing.
12. In the event of a violation of this easement, the grantee shall have the right to seek all appropriate legal and equitable relief, including, but not limited to, the right to restore the Easement Property to its present documented condition as shown in the photographs referenced in Paragraph 1 and assert the cost of such restoration as a lien against the Easement Property.
13. Whenever a written request for the Grantee's approval is submitted pursuant hereto and the Grantee fails to respond in writing within 30 days of receipt of such request, then the Grantee shall be deemed to have approved the request, and the Grantor may proceed with the Action for which approval was requested. Nothing herein shall be construed, however, to require the Grantee to issue a final decision on such request within such 30-day period.

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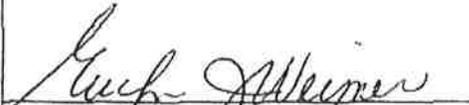
14. The invalidity or unenforceability of any provision of this easement shall not affect the validity or enforceability of any other provision of this easement or of any ancillary or supplementary agreement relating to the subject matter hereof.

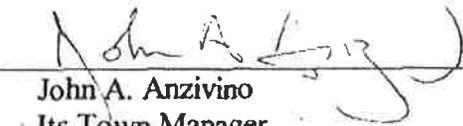
Acceptance by the Virginia Board of Historic Resources of this conveyance is authorized by Section 10.1-2204 and 10.1-1701 of the Code of Virginia of 1950, as amended.

Witness the following signatures and seals:

Attest:

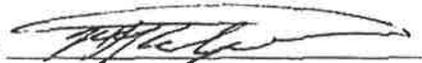
THE TOWN OF WARRENTON, VIRGINIA


Evelyn J. Weimer, Recorder

By: 
John A. Anzivino
Its Town Manager

Accepted:

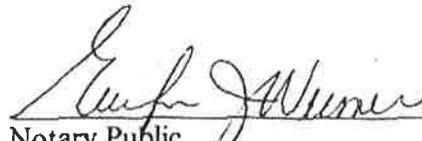
VIRGINIA BOARD OF HISTORIC RESOURCES

By: 
Kathleen Kilpatrick for
H. Alexander Wise, Jr.
Director, Department of Historic Resources

Date: 11-30-00

COMMONWEALTH OF VIRGINIA
COUNTY OF FAUQUIER, to-wit:

The foregoing instrument was acknowledged before me this 21st day of November, 2000, by John A. Anzivino, on behalf of the Town of Warrenton, Virginia, the Grantor therein.


Notary Public

My commission expires: 9-30-02



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BK 0903 PG 1444

COMMONWEALTH OF VIRGINIA
CITY OF RICHMOND, to-wit:

The foregoing instrument was acknowledged before me this 30TH day of ^{November} ~~October~~ 2000, by H. Alexander Wise, Jr., Director, Department of Historic Resources, on behalf of the Virginia Board of Historic Resources, the Grantee therein.

Amelia S. Cook

Notary Public



My commission expires: 7/31/2002

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FREDERICK WARD ASSOCIATES, INC.

ENGINEERS
ARCHITECTS
SURVEYORS

Metes and Bounds Description
Town of Warrenton Property
Town of Warrenton
Fauquier County, Virginia

Beginning at an iron pipe found on the northerly right of way of Main Street, corner with Tolson L.L.C., thence with the aforesaid right of way of Main Street N 57° 28' 01" W 209.76' to a point, on the easterly right of way of Calhoun Street, thence departing Main Street and with the aforesaid right of way of Calhoun Street N 32° 31' 59" E 271.48' to a point of curvature, thence 56.61' measured along the arc of a curve to the left, having a radius of 86.53' and a delta angle of 37° 29' 01" to a point on the easterly right of way of Calhoun Street, corner with Academy Hill Ltd. Partnership, thence departing Calhoun Street and with Academy Hill Ltd. Partnership N 63° 46' 52" E 354.93' to a point, corner with Academy Hill Ltd. Partnership and Shepherd, thence with Shepherd S 23° 29' 07" E 204.70' to an iron pipe found corner with Shepherd and in the line of Littrell, thence with Littrell S 68° 39' 28" W 132.08' to an iron pipe found corner with Littrell and Tolson L.L.C. thence with Tolson L.L.C. S 39° 40' 02" W 171.64' to a point corner with Tolson L.L.C. and another tract of land in the name of Tolson L.L.C., thence with the other tract of Tolson L.L.C. S 39° 04' 00" W 237.71' to the point and place of beginning, containing 3.0553 acres of land.

VIRGINIA: IN THE CLERK'S OFFICE OF THE FAUQUIER CIRCUIT COURT
This instrument was received in this Office and with

certificate admitted to record on JUN 20 2001

at 2:19 P.m. Tax of \$ — imposed by Section

58.1-802 Paid. Consideration: \$ 0

State Tax \$ Exempt County Tax \$ Exempt

Transfer Fee \$ — VSLF \$1.00 Technology Fee \$3.00 Exempt

Clerk's Fee \$ 17.⁰⁰ Total: \$ 18.⁰⁰

Teste: Gail H Barb Clerk

MARYLAND
BEL AIR
COLUMBIA
VIRGINIA
MANASSAS
WARRENTON

- Instrument Continued
ON NEXT PAGE(S) -

