

# The Historic Triangle Collaborative



## **Vision Project:**

An Examination of Organizational Planning  
within the Historic Triangle Region

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## **I. Introduction**

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September 26, 2011

Over the years, a variety of individuals and organizations in our community has asked questions about a long-range vision for the Historic Triangle. Do we have one? If so, what is that vision? If not, should we engage in developing one and, if so, how should it be developed? To this point in time, while the question has been asked often, there has been no efficient or effective mechanism to respond, nor has it been politically easy to undertake such a daunting task.

Now that the three political jurisdictions have agreed to undertake their comprehensive planning processes simultaneously, the question of a long-range community vision becomes even more relevant. Although comprehensive plans are primarily five-year land use planning documents, they inherently reflect longer-term values and aspirations of the community. In order to begin a community conversation about a long-range vision for the area, the Historic Triangle Collaborative has undertaken a review and analysis of the missions, values, visions, and strategic plans of major businesses, organizations, and institutions across the Historic Triangle – entities that control and direct major resources in the community and that therefore can directly and indirectly influence the community's future. The focus of this review and analysis is to determine the implied long-range vision for our area embedded in the long-range thinking of these businesses, organizations, and institutions.

Before delving into this report, it is important to understand clearly what it is, but even more important to understand clearly what it is not. It is not a long-range community vision. It is the implied vision of one part of the broader community as reflected in its existing statements and documents as well as the thoughts of its leaders. It does not reflect the views of large and critically important parts of the community, but does provide a starting point for beginning community-wide discussions that must be broadly inclusive and engage in purposeful thinking about the future of the Historic Triangle. The simultaneous comprehensive planning processes may provide opportunities to advance these discussions, but ultimately it will be up to the community to determine how much further such discussions should go and how best to conduct and coordinate those discussions.

Historic Triangle Collaborative summer intern and William and Mary Public Policy student Emily Grimes deserves many thanks for her excellent work on this project as does the Historic Triangle Collaborative's Kyra Cook. The time and commitment of participating organizations is deeply appreciated.

On behalf of the Historic Triangle Collaborative,

Clyde A. Haulman  
Mayor, City of Williamsburg

## II. Summary of Vision Project Findings

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Eighty-one (81) organizations within the Historic Triangle were contacted for the purpose of exploring the commonalities and differences in their views of the region's future as found in their mission statements, values, visions, and strategic plans as well as in interviews with their leaders. The group includes governmental, not-for-profit, and for-profit entities across the region. Each was asked to provide any mission statements, plans, and other documents that reflect its organization's values and view of the future. The criteria for selecting these organizations are provided in Appendix C. Of these 81 organizations, 56 participated in semi-structured interviews lasting between 30 to 75 minutes, a nearly 70 percent response rate. The interviews took place with at least one organizational representative that was in a leadership position and was knowledgeable about that organization's planning. Typically, representatives were executive directors, presidents, and chief executive officers. Only organizations interviewed are included in this analysis because of the limited amount of planning-related information available through other means from those organizations not interviewed.

The interviews combined with the sometimes extensive but oftentimes more limited documents available from each entity reveal a number of points that virtually every organization and its leader cited as relevant to its future. These documents and discussions reveal among these organizations an implied vision for the region.

Organizations and their leaders envision the Historic Triangle as a region that:

- Is a safe, strong, cohesive community committed to collaborative efforts;
- Provides a stable environment in which long-term organizational planning can take place in order to improve the quality, breadth, and types of products and services provided;
- Offers an effective, multimodal transportation system, that provides efficient inter-regional and intra-regional mobility of people, goods, and services;
- Grows and develops at a reasonable rate while preserving quality of life, unique community character, and the beauty and health of its natural environment;
- Possesses an efficient, effective, and coordinated local government structure that diminishes barriers from existing jurisdictional boundaries;
- Encourages a diversified regional economy, building on the Historic Triangle's comparative advantages while simultaneously supporting and enhancing the key sectors of education and tourism;
- Provides quality educational and employment opportunities and a full range of housing options for people to live and work in the community;

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- Is integrally connected to either the Hampton Roads region and/or the Richmond region, although some see the Historic Triangle as a stand-alone entity;
- Contains a balanced socioeconomic demographic composition, including a vibrant middle class and young professional workforce, and meets the unique needs of its vulnerable populations;
- Sustains uniqueness, of the region and of the individual organizations.

This implied regional vision stems from a review of mission statements, strategic plans, and other vision documents as well as interviews with leaders of organizations, which included discussion about the variety of opportunities and challenges executives see as affecting the future of their organizations. In essence, the above vision is a picture of what organizations and their leaders believe to be the ideal circumstances for their future as well as the future well-being of the region.

The following provides a more detailed discussion of the basis for the various elements of this vision as well as indicates where these organizations believe the region is doing well and where more effort is needed.

### **III. Elements of the Implied Vision**

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Most organizations' planning falls within the range of one to three years, with very few planning more than five years into the future. This is not to say that there is no long-term planning whatsoever; plans ranged from six months to twenty years. The short-term nature of the majority of plans is due largely to uncertainty in funding, transportation, growth and development within the region, and to local politics. A more predictable environment would create a stable foundation on which local organizations could plan. Currently, with much uncertainty and little long-term planning combined with constraints that cannot be resolved locally, organizational planning is generally reactive. Although official plans are limited in time frame, organizations and their leaders still possess clear visions of where their organizations are heading, including continuous dedication to quality and to pursuit of their missions. However, the goals and objectives necessary to pursue that vision may be uncertain. With shorter-term planning, organizations' visions and values appear to be more influential in their decision making, as goals and objectives must be flexible in order to react to a quickly changing environment. That said, the following elements of a vision for the future of the Historic Triangle emerge clearly from this study.

## **Transportation**

Virtually every entity desires a transportation system that enables it to efficiently connect within the region as well as outside the Historic Triangle. They need to be mobile in order to operate effectively and offer goods and services wherever they may be needed. Traffic congestion is universally seen as a threat to organizations in the region. A crippled infrastructure negatively affects the region's health and cannot be solved locally. Many organizations adapt their business practices by reducing travel, either through telecommuting, maintaining their service offerings exclusively to the local area, or establishing branch offices. However, these are not viewed as long-term solutions, and many express a sense of powerlessness over Commonwealth transportation funding decisions. Some organizations within the Historic Triangle see moving their offices out of the region as an unwanted inevitability, as transportation issues do not allow them to thrive and may not outweigh the benefits of living and/or working in the area. As many look to expand beyond the Historic Triangle, remaining in the region becomes more of a challenge. Although many sectors are impacted, tourism appears to be especially affected because transportation problems make it more difficult and less appealing for tourists to visit the region.

### **“Smart Growth”**

Support for “smart growth” among organizations is near universal. They envision the region growing at a reasonable rate capable of sustaining our quality of life and community well-being. Growth that is compatible with our community character is important to organizational planning because executives believe that without growth, the health of the community, and thus their organizations, will diminish. “Smart growth” is seen as a necessary way to reduce sprawl, which is harmful to the environment, public infrastructure, and the community in general. Instead, higher density development that preserves the character of the community in conjunction with conservation is seen as a healthier and necessary alternative to recent suburban sprawl and allows more conservation of green space. Many believe that the only way to preserve the high quality of life and unique community character is to grow at a reasonable pace. Development is necessary to maintain tax revenues, which allow the localities to provide ample services with reasonable tax rates. In addition, “smart growth” is viewed as something that should be adopted region-wide in order to avoid the recent, competitive duplication of development. Leaders worry about the vocal “no growth” movement and view it as a threat, though they suspect “no growth” advocates are in the minority. Uncertain whether any beneficial growth will be able to take place within the current political climate, organizations at times are hesitant to invest in the community, and some look beyond the Historic Triangle for opportunities in areas with less uncertainty and less-challenging political environments.

## **Political Subdivisions**

Organizations view Greater Williamsburg as one community in which jurisdictional boundaries are irrelevant. The community is in practice “larger than its governing bodies,” and they desire efficient and collaborative local government services that better reflect this. A number of leaders observe existing fixed jurisdictional borders that are reinforced through varied funding practices and territorial local politics. While regional collaboration is seen as necessary by all organizations, including the three jurisdictions themselves, the local governmental incentive structure discourages collaboration and fosters competition. One observer noted that the localities pretend to “act regionally, but fund locally,” making joint efforts that require funding difficult. Many believe that the local governmental funding incentive structure is bad for the health of the community, and a few organizational representatives suggested merging the three jurisdictions but recognize this is unrealistic. One organizational representative remarked that “we are legislated into inaction.” Many suggested consolidating local governmental services as a means to increase efficiency and diminish the impact of artificial jurisdictional boundaries, citing the Williamsburg Regional Library and Williamsburg-James City County School Division as fine examples.

Organizations and local governments recognize that their health is dependent on the health of the region as a whole. Despite this consensus, most organizational representatives remarked on the entrenched political opinions that often prevent collaboration. They see a need for more genuine efforts to partner among the three localities. They also observe that “too much political capital is spent infighting” and find it “troubling that the birthplace of American democracy is so partisan.” This creates an unstable environment that inhibits organizations’ ability to plan long term and at times discourages investment in the region. One issue that came up was land planning coordination and the limited incentives that local governments have to coordinate when their revenues come only from development within their borders. One individual interviewed remarked that this system “does not allow for good land use planning.” Executives believe the coming 2012 simultaneous comprehensive planning process among the three jurisdictions will be a test of the contrasting forces of community collaboration and the governmental incentive structure. Executives also note an absence of strong, visionary leadership within the community, suggesting there may be no point to any such attempts within an unreceptive and divisive political atmosphere. Yet, they recognize that almost every obstacle individual organizations face cannot be solved alone but requires a regional response.

## **Regional Economy**

Organizations and their leaders want a diversified economy that includes support for strong local institutions such as the College of William and Mary and Colonial Williamsburg. They recognize a need for increased economic diversification and see other issues such as transportation, public

resistance to growth, and political divisions as obstacles to achieving greater economic diversity. Organizations are willing to assist with this effort as much as they can within their missions. They perceive economic health and diversity as inclusive of a healthy tourism industry, in addition to the growth of other industries that fit in with the community. The Historic Triangle is not only a wonderful tourism, education, and retirement destination but can be a vibrant business market. However, organizational leaders believe public opposition to “smart growth” is a threat to creating a more diverse and healthy economy.

With the local tourism sector challenged by a variety of factors including the current economic situation and increased competition nationally and internationally for tourism dollars, survey participants see a need to bolster the sector’s health. Challenges for the sector are seen as ranging from varying opinions regarding the best means of gauging the health of the market to a need for leadership in providing a cohesive and collaborative vision for tourism’s future in the region. Despite numerous critical collaborations among major attractions, including the unique collaboration among Colonial Williamsburg, Preservation Virginia, the National Park Service, and the Jamestown-Yorktown Foundation as well as the effort to gain World Heritage Site designation for the Historic Triangle led by Colonial Williamsburg, many survey participants believe collaborative efforts should be broadened and expanded. Tourism and hospitality organizations pursue individual measures to improve their own position within the market and to attract more visitors. At the same time, these organizations recognize that they have insufficient impact as individuals and believe regional efforts are necessary. Virtually all those organizations participating in the survey believe that Williamsburg must be successful as a destination in order for their individual organizations to thrive.

### **Challenging Demographics**

The demographic composition of the Historic Triangle provides unique challenges for the region. The region has a disproportionately high aging population and a scarcity of young professionals. The available jobs and ages of residents are bifurcated between young and old, upper and lower income brackets, and low and high skill. There is very little in the middle, which is of concern regarding the health and vitality of the region. Executives envision a less divided demographic composition, including vibrant middle class and young professional components. Their vision also includes working to meet their needs of demographic groups who struggle.

As a result of demographic divides within the community, there are often conflicting needs and opinions among the different demographic groups. Many leaders observed greater need for senior-related services. Organizations also are concerned about meeting the needs created by a bifurcated class system. This includes the need for affordable housing, day care options for workers, and access to transportation. Many low-wage workers, especially, have to commute into the region from elsewhere because they cannot afford to live in the community, while at the same time, many workers residing within the Historic Triangle choose to live here owing to the high quality of life and commute out to work. One survey participant vividly described these two



populations as passing by each other on the highway, commuting “out in luxury cars and in with pickup trucks,” demonstrating the stifling effects this has on community cohesiveness as well as transportation congestion. There are two separate communities living in the Historic Triangle at the same time: one of affluence and one struggling to make ends meet. The challenges that low-wage workers face are exacerbated by seasonal employment, the need to hold multiple jobs in order to get by, and the time and cost associated with commuting for those that travel from outside the region. Many executives believe that, if this class divide within the community is not addressed, it will negatively impact the region in the long run. One obstacle to addressing these needs is a focus on thinking about resource scarcity among organizations providing support and services to workers. A “glass half empty” mentality in an uncertain economic environment is described as a threat that might paralyze organizations and prevent them from meeting the needs of the community, creating a vicious cycle in which the community suffers and supporting organizations deteriorate in return.

### **A Culture of Uniqueness**

Interviews revealed that the Historic Triangle is a community composed of self-described unique organizations, whose composition and character are, and will remain, unparalleled. Regional and organizational uniqueness provides a wealth of resources and expertise for a relatively small community, but it also produces obstacles. Most participating organizations did not see any comparable organizations or locales from which to learn or evaluate their methods, potentially preventing the exploration of best practices and business models because of their uniqueness. Such uniqueness may also stifle collaboration, with organizations possessing less in common with one another and fewer opportunities to pursue joint interests. Organizations that characterize themselves as unique possess the potential to limit thinking as well, inhibiting awareness of commonalities and shared interests that may be present.

Some organizations have forgone offers to merge with other entities, and many more articulated plans to remain independent and autonomous in order to stay unique and capably respond to the distinct regional needs, despite broader national trends of mergers and consolidation. With the region full of organizations that strive for excellence rather than adequacy, it is common for each to also seek the highest accreditation and receive great recognition. For-profit entities noted that profit is not always their primary motive. This uniqueness can provide great means to leverage funding and contribute to the vibrancy of the community. During tough and unstable economic times, it may also provide a competitive edge.

### **Geographic Location**

Williamsburg’s relationship to neighboring regions is the only part of the larger, implied vision that was not overwhelmingly universal. In this case the view was mixed. Organizations and their leaders envision the Historic Triangle as a region that is either strategically linked to nearby metropolitan areas or stands as a self-contained and sustainable regional market.

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The implications of the geographic location of the Historic Triangle's existing between the two large metropolitan areas of Richmond and Hampton Roads can be considered a great opportunity or an extraneous factor. Executives either desire strategic ventures, collaboration, and communication with outside locations or focus on the unique, self-contained characteristics of the Historic Triangle. They currently work with whichever outside locations they believe are receptive and provide opportunities for them or focus more exclusively within the Historic Triangle.

One way that organizations conceptualize our location is as a strategic position from which to reach both the Richmond and Hampton Roads markets. Some plans include marketing goods and services to customers that have a footprint in both markets.

A second viewpoint, common to political and cultural organizations, is that the Historic Triangle is part of Hampton Roads, with which we should more strategically align ourselves.

Collaboration with Hampton Roads is seen as beneficial and necessary because the Historic Triangle is part of the Hampton Roads metropolitan statistical area. This point of view suggests that Richmond does not provide many opportunities and is less culturally affiliated with the Historic Triangle as well as uninterested in our priorities, inhibiting collaboration to the west.

The third mode of thinking is that Richmond is the most strategic place to look; Historic Triangle organizations need to capture the patronage of residents living between Williamsburg and Richmond, who have limited shopping, service, and entertainment options within their locale. Some organizations also observe that many of their clients live in the Historic Triangle but work in Richmond, strengthening our cultural ties to the area. This view is common to the service sector and development community who see the growing area between Williamsburg and Richmond as a strategic place to capture before others do. Richmond is also a location where organizations based in the Historic Triangle can easily operate and expand. Along with this view, organizational representatives often cited the view that Hampton Roads ignores the Historic Triangle.

The final way of conceptualizing the Historic Triangle's geographic location is as an isolated, self-contained entity. This thinking considers the Historic Triangle market as separate from other surrounding markets; patrons will not travel from outside the Historic Triangle to buy goods and services in the area. Further, the Historic Triangle is not viewed as culturally similar to either Richmond or Hampton Roads, producing few commonalities from which to generate collaborative efforts with these regions. This relates to the culture of uniqueness. One organizational representative described the Historic Triangle as "a rose between two thorns." For some, envisioning lower York County as a part of the sub region is even a stretch because lower York has little in common with Greater Williamsburg and is closer to Hampton Roads.

Opinions regarding the Historic Triangle's relationship to the metropolitan areas to our east and west are essential to organizational planning. It makes the difference between organizations

deciding to expand or collaborate outside the Historic Triangle or not. It also determines the extent of their presence and efforts within the Historic Triangle community. Further, issues such as transportation, growth, and the local political environment all affect organizational decisions regarding targeted locations. For instance, the severity of traffic congestion in Hampton Roads often led organizations to focus towards Richmond.

#### **IV. Reaching the Implied Vision**

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Despite limited long-term planning among organizations within the Historic Triangle, all hold strong values and consider their organizations, whether big or small, for profit or not-for-profit, capable of and responsible for positively impacting the community. The ability of organizations to embrace and work to implement their values influences the components of the implied regional vision and provides the means through which the implied vision may be achieved. Unlike many of the components of the implied regional vision, organizations articulate and adopt, with remarkable similarity, many of these measures in their visions, values, goals, and objectives.

The following discussion incorporates organizations' views of and commitment to the values they believe are essential to a strong and vibrant Historic Triangle.

##### **Work Collaboratively**

By far, the most widely held and prioritized value observed among organizations is a commitment to collaboration and partnership. Organizations incorporate collaboration into their routines for a wide array of purposes. Many discussed impressively long lists of joint efforts with a variety of other organizations. One prime example is the collaborative effort to designate the Historic Triangle as a World Heritage Site, including federal, state, and local organizations led by Colonial Williamsburg. Collaboration is seen as an essential tool to leverage the wealth of resources that other organizations possess in addition to its being beneficial to the community as a whole. Many organizations consciously define a niche in which they work best, allowing others to fill in the areas that are left and often necessitating partnership and collaboration to utilize resources outside this niche. With technology decreasing the relevance of borders and geographic location to the workplace, the logistics of collaboration are often described as easier than ever before. Frequently because of this same decreasing locational relevance, many see increased competition from locations outside the region and even around the world, prompting the need for more intra-regional collaboration. Organizations take pride in and work to maintain their reputations, relationships, and levels of trust within the community and among other organizations in order to facilitate cooperation.

Despite the strong commitment of organizations within the Historic Triangle to collaborative efforts, many see even greater need for collaboration within the region compared to what is currently taking place. They recommend more genuine commitments to cooperation by others, more frank discussions, and a better understanding of the views and goals of all involved in order to identify where commonalities exist from which to build partnerships. Some point to structural elements of organizations that make it difficult to collaborate, including the size of organizations, management structures, and incentive structures. While a desire to collaborate is a universal value, some organizations noted that, once money is involved, incentives to work independently are often too great to overcome.

### **Support Historic Heritage, Cultural Institutions, and Education**

Organizations within the Historic Triangle recognize the value of the region's extraordinary cultural and educational institutions and its historic heritage. They also recognize the relationship of these assets to the health of the region, and even their importance to the health of individual organizations. Leaders believe that supporting these institutions helps to preserve the uniqueness and competitive advantage of the region. The missions of many participating organizations directly relate to or provide historic, cultural, or educational values such as colleges and museums. Others choose to adopt goals and objectives to support these values that do not inherently or directly relate to their primary missions. Some encourage or even require their leaders and employees to support related efforts, often blurring the lines between organizational and individual contributions. At times, organizations develop advocacy roles to make the local environment more conducive to cultural, educational, or history-orientated entities and priorities. This may include asking localities or not-for-profits for funding, support, or policies related to public education or the celebration of history.

### **Offer Quality Employment Opportunities**

Participants prioritize offering quality employment opportunities for workers with a wide range of skills. They see this as a means to decrease the bifurcation of the region's workforce and to meet the physical, mental, and financial needs of community members. Goals include respecting and enriching employees and often providing training, benefits, and year-round employment. Employing local residents and paying enough for workers to be able to afford to live in the area is also important. However, many organizations note significant workforce issues, including a bifurcation in the levels of income and skills necessary for job opportunities available in the area, limited affordable housing, seasonal employment needs, and a lack of daycare options. Executives observed that this creates an environment in which many employees hold low-paying jobs, commute to work from outside the area, and hold multiple jobs. Employers try to alleviate these circumstances through their own practices but are often constrained and see these issues as too complex to solve at the organizational level. They are frequently restricted from simply increasing wages by corporate decision making or market constraints.

### **Seek a Balanced Economy**

Many organizations either contribute to a more diverse economy themselves or support efforts to sustain a balanced regional economy. They see this as necessary for the health of the region, especially in the long term, and an essential means to decrease the bifurcation of the region's workforce. It also helps to meet the needs of all community members, either individually benefitting residents through employment opportunities or by creating an environment better able to afford and provide services to meet their needs.

Organizations believe that a balanced economy includes both improving the health of the tourism industry as well as diversifying the types of businesses present in the region. "Smart growth," a term frequently used to characterize this desire, incorporates not only balance among the types of organizations within the community but also a balance among the rate and type of growth taking place. Participants believe development needs to be carefully planned, maintain the character and quality of the community, and involve industries and housing types that benefit the area. Attracting and retaining desirable businesses is a complex task and relevant even to fellow businesses because it contributes to the health of the region and their organizations. Thus, some take it upon themselves, whether related to their missions or not, to entice beneficial businesses to the area, often through social connections and word of mouth. However, they recognize that it takes much more to do so, including long-term planning and infrastructure. As one representative stated, businesses "don't show up overnight and don't leave overnight," pointing out the long-term nature of these matters and the foreword thought and planning necessary on a regional level.

### **Respect the Environment and Its Natural Resources**

Many participants' primary mission is designed to protect the environment. Yet, many others whose missions serve a wide variety of functions still adopt a deep sense of responsibility to be environmental stewards, to protect the uniqueness of the region, and to ensure the health of the community. They see the environment as an important aspect in preserving the region's unique character, competitive advantages, and economic well-being. Organizations pursue innovative means of incorporating environmental stewardship into their activities and objectives. Efforts range from more traditional recycling programs to utilizing the latest technology to dramatically increase energy efficiency. Often, the idea of "smart growth" is also associated with respect for the environment and maintaining environmental health as growth and development occur and is not seen as an inherent conflict to environmental protection if properly planned and respectful of the existing community.

### **Support Infrastructure**

Planning is especially important to create and maintain necessary infrastructure before demand exceeds supply. New infrastructure cannot be rapidly created, and stresses on the systems have the potential to quickly intensify. Currently, transportation infrastructure is a great concern for

most of those surveyed, and its inadequacy is seen as a threat to business, to the point that some are forced to adapt their practices in response to poor infrastructure. Many responses to transportation issues included telecommuting or even creating additional branch offices outside the Historic Triangle. A few organizations seek innovative solutions, such as advocating for more flights to come into the Newport News/Williamsburg International Airport. However, many are powerless to address what they see as a transportation crisis that is capable of negatively affecting them individually and the health of the region as a whole. A few expressed the view that we are “choking ourselves” and cutting ourselves off from outside locations owing to transportation difficulties. At times, organizations advocate either locally or on a broader level to persuade state government to pursue transportation solutions. While transportation is certainly important and the most salient issue, other necessary infrastructure is crucial as well and requires continual planning and investment in maintenance and expansion by a variety of organizations. All infrastructure affects the health and vitality of the community, and organizations recognize the importance of sustaining its health.

### **Contribute to a Healthy Community**

The health of a community encompasses many different facets, including economic, environmental, social, cultural, as well as the overall wellness of the population. The ways in which organizations see themselves contributing to community health, likewise, are diverse, ranging from issuing grants to creating a product that adds to the economic diversity of the area. Supporting community health incorporates every value discussed above, from collaboration to quality employment opportunities. It underpins the interconnected nature of all methods employed to positively impact the region and organizations. The bottom line is that organizations desire and pursue an ever stronger, cohesive, and healthier community. The contribution of individual organizations towards this goal depends on what elements correspond with their missions as well as their unique perspectives.

Many organizations discussed adapting their services and products to fill unmet community needs, such as health care services for which need exceeds supply. Some organizations intentionally maintain organizational structures conducive to adept response to changing community needs. This includes preserving smaller structures, which allow for local, decentralized decision making, or foregoing opportunities to expand outside the region in order to remain nimble in their response. A few organizations even require their leadership to be involved in local charity work to contribute not only to the community’s health but also to the organization’s awareness of community needs. Many, wishing to remain neutral on political issues they regard as important to the health of the community, envision their own community involvement as providing a voice regarding key policy decisions. In the instance of economic support, organizations often make investments or decisions that are slightly less advantageous in the short run for the greater long-term good, and ultimately their own benefit.

## V. Conclusions and Next Steps

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There are striking commonalities in thinking and planning among the Historic Triangle organizations participating in this review and analysis. Planning is marked by short-term thinking for most as a result of increasing uncertainty within the broader environment in which they operate. Most are able to plan between one and three years ahead, but planning horizons range from six months to twenty years among those participating in the study. The unique character of the area, the exceptional quality of life, and the need for a balanced economy emerge as overarching themes among all organizations.

Further, “smart growth” that preserves those characteristics they value, strengthening the region through community involvement, and being environmentally friendly are highlighted by study participants. Ensuring their existing uniqueness, pursuing excellence, expanding partnerships and collaboration, and monitoring and responding to client and community needs are also seen as critical to these organizations as well as for the region.

Finally, many also hold the belief that borders and geographic location are decreasingly relevant to their operations because technology facilitates work from almost any location around the globe, but they also believe infrastructure, particularly transportation, and political boundaries provide challenges that must be met if the region is to prosper.

A number of elements of the implied vision that emerges from this study are not surprising to anyone familiar with the Historic Triangle today. But some are - for example, the universal focus on “smart growth” - and require particular attention in future discussions. In addition, what is not highlighted – for example, health care and sustainability – is also worth thinking about and discussing with equal intensity.

In order to encourage a broader community conversation regarding a long-term vision for the Historic Triangle, this review and analysis should be forwarded to the Regional Issues Committee to help inform their discussions and as a catalyst for their future deliberations. Further, the governing bodies of the three Historic Triangle localities, the James City County Board of Supervisors, Williamsburg City Council, and the York County Board of Supervisors, and the Planning Commissions of the three jurisdictions should receive copies of this study for their consideration and possible use as the region enters the 2012 simultaneous comprehensive

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planning process. Finally, each organization participating in the project will receive a copy of the findings.

This review and analysis of the implied long-term vision of the Historic Triangle stemming from the missions, values, visions, and strategic plans of major businesses, organizations, and institutions across the region should provide the springboard for individuals and organizations across the Historic Triangle to engage in and contribute to broad-based, inclusive community conversations out of which a coherent long-range vision for the Historic Triangle can emerge to provide a framework for both the short-term and long-term decisions of governments, businesses, organizations, and individuals.



## **VI. Appendix A: Analysis by Organizational Type**

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All 56 participants fall into one or more of the categories listed below. Based on what was garnered from interviews, available materials, and planning documents, common elements among organizations within each category regarding their future plans were identified.

### **Local Governmental Organizations**

Eight local governmental organizations were surveyed. This includes all three Historic Triangle localities, along with respective economic development offices, housing offices, and locality-specific utilities. Information garnered from these entities included interviews, comprehensive plans, mission statements, visions, values, and strategic plans. There is a strong sense of partnership and collaboration between the three localities as well as the targeted departments. Preserving the high quality of life and our regional uniqueness is a driving force for all initiatives and serves as an impetus for collaboration between jurisdictions, with the notion that what occurs in one of the localities affects the health of the others. In order to protect the character of the region, local governments monitor the needs of the community and strive to adeptly respond to any changes in these needs. One identified area of need is a more diverse economy, which localities seek through carefully planned growth in order to preserve our quality of life. The Historic Triangle's unique character provides an incentive to attempt to attract current and future development that fits with the existing community character. Thus, there is a great deal of consensus among the three localities that they should prepare for well-managed growth because the quality of the community will not sustain itself without a certain degree of growth. There is a belief that preserving the status quo is not possible because "if you don't grow, you die." Federal and state regulations also impact future planning, necessitating compliance with federal and state mandates. Local government also works to ensure that local regulations are easily understandable and best serve the community. One such effort is the coordination of all three localities' comprehensive planning processes to simultaneously begin in 2012, an unprecedented effort.

### **Regional Governmental Organizations**

Five regional governmental organizations contributed to the study. Interviews of all five organizations along with mission statements and an assortment of visions, values, and strategic plans informed our understanding of their future plans. These entities have a variety of revenue sources rather than one primary funder, making future funding uncertain and sometimes contentious. To work out funding arrangements, negotiations are often involved with all funding sources to determine who is footing which parts of the bill. As a result, planning often tends to be shorter term, with some focusing mostly on annual budgets, as funding may change yearly.

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Changes in local political leadership can be especially challenging, creating instability regarding funding. Despite serving diverse functions within the community, many commonalities among these organizations emerge, including their aspiration for excellence, desire for partnerships, and responsibility for and attention to the safety of their clients and the public. Several are considering opportunities to expand services and infrastructure in order to better fulfill community needs; however, this will include further funding negotiations. As stewards of the community, they seek innovative means to work towards the greater good, including plans to pursue opportunities to be environmentally friendly, even if this does not directly relate to their primary mission. The need for safety and compliance with federal and state regulations also warrants many planning and funding considerations, such as negotiating additional funding from local governments to meet new regulatory requirements.

### **State Governmental Organizations**

Three state governmental organizations participated in our survey. Once again, interviews of all three were conducted in addition to viewing mission statements, visions, values, and strategic plans as available. All three seek excellence in their fields, which serves as a staple of their organizational identities and a driving force behind their plans. In order to maintain such distinction, it is important to define a niche in which their focus remains so that they continue to be exceptional, unique organizations. Some even forewent opportunities to expand services in response, only choosing to pursue those that remained most relevant to their mission and vision, such as an organization only offering educational programs that fit in with its particular teaching style. The ability to harness technology to their particular advantage while preventing it from obscuring their missions is a common goal among state governmental organizations. For example, they work to incorporate technology into their programming in a way that does not distract from the substance of the program. Diminishing state funding is a short- and long-term concern, prompting them to seek greater support from donations and revenue-producing activities. The state invests generously in infrastructure, but organizations struggle to cover operational costs. Within their niche, they also find many ways to respond capably to community needs. They foresee their actions affecting individuals throughout the state, the nation, and even the world through education and institutional visibility. Their impact includes the effects they have on the individuals they have touched and extends beyond this group as these individuals further contribute to society. Community involvement and developing a stronger community presence are common goals, which are sometimes difficult to accomplish given public perceptions that these large state entities are not focused on the local area. As a result, communications strategies are especially important to reach the local community.

### **Federal Governmental Organizations**

Two federal governmental organizations were surveyed utilizing interviews as well as a variety of other information provided. Like other organizations within the Historic Triangle, they both seek to maintain their unique character and their reputation for excellence. They possess rich

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historic value as well as plentiful land, attributes of which they are cognizant and that are large factors in their planning processes. Partially owing to this fact, they also work collaboratively on a variety of endeavors with a variety of organizational types and take great measures to protect their natural resources. Transportation infrastructure is important to the mission of both organizations, and each plans to affect infrastructure in various ways, whether through advocacy roles or investments in its maintenance.

### **Utilities**

Three utility organizations participated in our survey, providing interviews and mission statements along with some visions, values, and strategic plans. Maintaining and investing in new and existing infrastructure is a central focus for all, including the need to monitor development patterns in order to anticipate future demand and to prepare for that demand before it occurs. Working collaboratively is a priority for all three as well, commonly with other utility organizations. They believe that collaboration and investments in infrastructure and technology are in the best interest of everyone. Utilities envision a role for themselves to protect the environment either through their primary mission and services or by incorporating it into their endeavors. These organizations see “smart growth” as necessary to their missions, allowing them to better provide services and the infrastructure to meet demand. They encourage “smart growth” through guidelines that determine what sort of development may gain access to their services.

### **Educational Organizations**

Nine educational organizations, including governmental and not-for-profit entities offered information through interviews and mission statements along with a variety of visions, values, and strategic plans. Many of these are reexamining their strategic plans in response to a quickly changing environment. As governmental and not-for-profit organizations, financial sustainability is a major concern. State funding is especially uncertain, as they compete for support on the state level with other pressing needs such as transportation. Owing to financial insecurity, educational organizations are increasing their efforts to diversify revenue sources. Some seek to expand service offerings aimed at producing revenue in order to fund their primary mission. Their dedication to enriching students as well as teachers, employees, and the general public stands out as a central aspect of their plans, including providing continuing education, training, and stimulating work environments. Engaging a wide array of individuals is important to organizational missions owing to the connection they see between the enrichment of teachers and employees and their subsequent ability to better instruct and engage learners. Excellence is a defining characteristic of each organization and remains central to their future plans. Many conceptualize education as an essential element of democracy and citizenship, leading them to assume great responsibility for their audience as well as for the public. This, along with their expansive definitions of the individuals that they seek to engage improves the health of the community, the region, the state, and even the world through their primary missions in addition to other outreach activities. Organizations plan to stay attuned and responsive to community

needs and pursue collaborative efforts with local governments, not-for-profits, and for-profit businesses. Communication strategies for some include establishing a brand identity, either for the individual organization or the region as a whole. Integrating and leveraging technology in a way that increases their effectiveness in pursuing their mission is another common goal.

### **Associations and Advocacy Organizations**

Among those surveyed, nine fell under the category of membership associations or advocacy organizations. As a fairly diverse group with membership and areas of focus ranging from trade groups to not-for-profit enterprises, there was a wide range in the amount of information available to us. All entities shared their plans through interviews and mission statements, and many provided visions, values, and strategic plans. There was limited evidence of long-term planning although many are drafting new strategic plans. This is in a large part the result of their need to identify and react to the changing environments in which they work. All associations and advocacy groups serve as a support for and resource to a larger audience, which may include the general public, members, or other organizations. Two areas in which multiple organizations focus are encouraging and facilitating philanthropy, such as assisting donors or grant recipients, and improving the health of the industries they represent or the economy in general.

### **Medical, Health, and Human Services Organizations**

Ten participants in this survey fall in the categories of medical, health, or human services. Like other categories, this encompasses organizations that are both for-profit and not-for-profit and whose missions vary substantially. There is also a wide range in the amount of information they were able to provide, with some sharing through interviews and mission statements alone and others offering a variety of strategic plans, visions, and values. Among these a great deal of long-term planning was not observed, although several strategic plans are in draft form. Because of great uncertainty in the future, several organizations have created contingency plans in order to react appropriately to multiple possible future environments. At the same time, they work to ensure their long-term sustainability; those with endowments are not diminishing their endowment for short-term financial solutions, refusing to “burn the furniture to stay warm.” They also collaborate in order to serve all members of the community. For example, health care providers develop charity-care agreements so that their patients can receive necessary medical treatment.

Commonalities among plans include a desire for excellence and to be the “organization of choice” to their specific audience or client base. This drive often stems from different forces, with some believing it is necessary to compete within the market and others driven more by their values. Organizations also envision a role for themselves to positively affect the lives of individuals and the community at large. They work to identify and react to a changing environment and community needs, striving to fill growing gaps between services and demand. One organizational representative described the community as becoming “older, sicker, and less

insured.” They try to do what is best for their clients rather than what may be economically ideal for the organization. For instance, providers of health care focus on wellness for patients, even though medical emergencies provide more revenue. Serving their clients also includes coming up with innovative means to better meet needs, which many organizations incubate on a small, local level to test potential for larger-scale solutions. Many organizations also play a role in advocating or advising others regarding how to meet community needs. This often includes providing educational or informational services, even when it is not a defined service that they offer, such as advising clients regarding retirement planning. For organizations serving similar needs as other entities within the area, most differentiate themselves, not by the kind of services that they offer, but through their individual culture and the quality of their service. Some face workforce issues, including struggling to find qualified employees who live close enough to reasonably commute, which is difficult owing to limited affordable housing in the region. Many organizations indicate that if these issues are not addressed, they will be unable to provide services to meet community needs.

### **Conservation Organizations**

Three participants play a significant role in land conservation. Interviews were conducted with and mission statements received from all three as well as a mixture of visions, values, and strategic plans. All pursue conservation for the current and future benefit of Historic Triangle residents and the general public. This goal is directly tied to the uniqueness and heritage of the community. They also seek to collaborate with other organizations and individuals, especially to conserve land strategically. At times, their missions may conflict with what the public believes their missions are or should be; however, they try to meet public needs while staying true to their missions. This may include supporting “smart growth” as a necessary balance between growth and conservation. All recognize that growth itself is both inevitable and necessary. They pursue educational roles in different ways, whether directly regarding the value of conservation or less directly such as providing information about the historic context of the land they hold.

### **Cultural Institutions**

Seven cultural institutions participated in the survey, including not-for-profits and governmental entities. All took part in interviews and shared mission statements, with many sharing visions, values, and strategic plans as well. Among these, all possess a strong mission to educate an array of audiences in various ways as well as a passion to achieve and maintain their reputations for excellence. Their educational roles also contribute to a sense of responsibility to the community and a desire to be sensitive to its needs. Cultural institutions seek collaboration in order to better serve the community and other targeted audiences and to be more responsive to their future needs. Many see a role for themselves in encouraging interaction and communication among individuals and organizations, establishing an active role in increasing the vitality and cooperation in the region. As not-for-profit and governmental organizations, financial stability is an ongoing concern. Many pursue diversified revenue sources in response.

## **Media Organizations**

Three media organizations, both not-for-profit and for-profit are included in this survey. They took part in interviews as well as provided a mixture of missions, visions and values. Each views its role as serving and enriching the community. They all see themselves as unique in their quality, products, and dedication to values. They target specific markets, providing a great deal of regionally relevant information. Media organizations also seek to increase their respective market shares because that is directly linked to their funding, whether it is through revenue from advertising or expanding their subscription base. Most also utilize technology to their advantage in order to efficiently reach audiences or provide services to a greater market.

## **Real Estate and Development Organizations**

Real estate and development encompasses seven organizations' missions, from developers to real estate and brokerage firms. All were interviewed, with some sharing mission statements, visions, values, and strategic plans. "Smart growth" is championed by each and is associated with the belief that jurisdictional borders are less relevant than ever. Borders do not matter to developers, unless local regulations are prohibitive, because technology creates an environment in which geographic location has much less influence on their ability to operate. This thinking helps to better plan for development and achieve community vibrancy. Decreasing locational relevance has also increased the outside competition for many organizations, not only within the region but also from locations around the world. Consequently, the high quality of life within the Historic Triangle is an ever-more-compelling incentive to encourage appropriate development within the area. Reputations and relationships with potential clients and investors also weigh heavily on decisions by developers and businesses to invest in the region. Transportation problems, on the other hand, are a major constraint to development. Many organizations come up with innovative means to adapt their ways of doing business in response, such as utilizing electronic communication and spreading out their offices to avoid sitting in traffic.

## **Tourism and Hospitality Organizations**

Nine participants in the survey fall into the tourism and hospitality, including both not-for-profit and for-profit organizations. Some directly involve tourism and hospitality services, while others are associations that serve and advocate for the industry. Available information included interviews from all and a mixture of missions, visions, values, and strategic plans from some. There appears to be limited evidence of long-term planning in this sector although a large number of strategic plans are currently being drafted. All appreciate and try to leverage the unique qualities and historic heritage of the Williamsburg area in order to maintain the vitality of their organizations and to continue to attract tourists and clients. The tourism industry is described as a "complicated small market" by some. This prompts them to attempt to find creative ways to influence the market with relatively limited means because the overall health of the destination impacts their ability to thrive. Organizations seek collaboration and partnerships

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in order to respond to these challenges, especially for marketing and operational functions. Many continue to invest substantially in their products and services, especially in response to declining visitation from source markets, in hoping to attract customers and visitors. Some pursue opportunities to lengthen the tourism season to a year-round market through increased programming. Almost all organizations work on new and innovative means to engage visitors, which for some include the use of technology. This also involves engaging employees and volunteers through training in order to create exceptional visitor experiences. Both not-for-profit and for-profit entities face labor market challenges, with a large number of commuting employees and a seasonal workforce. In response, organizations develop initiatives to provide quality employment opportunities for workers with a variety of skill levels. Many also leverage technology in order to pursue their missions as well as increase sales. They use innovative means to address transportation issues, sometimes creating partnerships to ensure visitors have plentiful access to transportation options and knowledge of the area. For a few, corporate decision making from outside the region is a challenge to their ability to adeptly respond to the unique and complex regional market. Although not related to the primary mission of most, many also adopt a responsibility to be stewards of the environment.

### **Financial Institutions**

Four financial institutions participated in interviews and provided information from a mixture of missions, visions, and values. All see the region as a vibrant market for finance, despite the plethora of similar institutions within the area. They try to capture market share by differentiating their quality of services and ability to make individualized, local decisions and offerings. All work to provide benefits to their customers as well as contribute to the health of the community as a whole. They see their roles as helping to diversify the regional economy and encourage “smart growth.” By funding a variety of residential, commercial, and even industrial development projects, especially ones that fit in with the community character, they help to determine what kind of growth occurs in the area. Personal services and customer relationships are key to their businesses and their ability to contribute to the community. Local decision making and employment are essential to respond to individual and community needs, whether the organization is a smaller community bank or part of a much larger corporate structure. Dedication to community involvement includes monetary donations as well as contributing the time of leaders and employees. Monitoring demographic trends and customers’ needs is important to all, and local decision making allows for nimble response. Many are expanding their services or service area as well, with some recognizing the decreasing importance of geographic location and reaching out beyond the Historic Triangle’s borders.

## VII. Appendix B: Organizations Contacted and Contributing to the Study

Organization	Participated
A-B InBev	✓
AES Consulting Engineers	✓
AVID Medical	
Busch Gardens	✓
Chambrel	✓
Chesapeake Bank	✓
Child Development Resources	✓
Citizens and Farmers Bank	
City of Williamsburg	✓
Coast Guard Reserve Training Center	
College of William and Mary	✓
Colonial Behavioral Health	✓
Colonial National Historical Park	✓
Colonial Williamsburg Foundation	✓
Cox Communications	✓
Cultural Alliance of Greater Hampton Roads	✓
Daily Press	
David A. Nice Builders, Inc.	
Davis Media (WY Daily, Tide92.3 & Bachfm)	
Design Masters	
Dominion Virginia Power	
Great Wolf Lodge	
Greater Williamsburg Chamber and Tourism Alliance	✓
GuideStar	✓
Hampton Roads Sanitation District	✓
Henderson Incorporated	✓
James City County	✓
James City County Economic Development Authority	✓
James City County Housing and Community Development	
James City Service Authority	✓
Jamestown-Yorktown Foundation	✓



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Organization	Participated
Kings Creek	✓
Kingsmill Realty, Inc./Busch Properties Inc.	✓
Lumber Liquidators	
Middleburg Bank	✓
National Center for State Courts	
Naval Weapons Station	✓
Olde Towne Medical Center	✓
Owens-Illinois	
Peninsula Housing and Builders Association	
Premium Outlets	
Riverside Doctors' Hospital	✓
RJS and Associates	✓
Sentara Williamsburg Regional Hospital	✓
Suntrust	✓
Thomas Nelson Community College	✓
Towne Bank	✓
United Way of Greater Williamsburg	✓
Verizon	
Virginia Gazette	✓
Virginia Natural Gas	
Virginia Peninsula Regional Jail	✓
Walmart Import Distribution Center	
Walsingham Academy	
Watermen's Museum	✓
WHRO	✓
Williamsburg Area Association of Realtors	✓
Williamsburg Area Restaurant Association	✓
Williamsburg Area Transit Authority	✓
Williamsburg Bar Association	
Williamsburg Community Foundation	✓
Williamsburg Community Health Foundation	✓
Williamsburg Economic Development Authority	✓
Williamsburg Environmental Group	
Williamsburg Hotel Motel Association	✓

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Organization	Participated
Williamsburg Housing and Redevelopment Authority	
Williamsburg- James City County Education Foundation	✓
Williamsburg-James City County Public Schools	✓
Williamsburg Land Conservancy	✓
Williamsburg Landing	✓
Williamsburg Pottery	
Williamsburg Regional Library	✓
Williamsburg's Next Door Neighbors	✓
WMBG	
Wyndham Vacation Ownership	✓
Xanterra Kingsmill Resort	✓
York County	✓
York County Chamber of Commerce	
York County Division of Housing	✓
York County Economic Development Authority	✓
York County School District	✓

## VIII. Appendix C: Vision Project Statement of Objectives

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The Historic Triangle Collaborative (HTC) seeks to better understand the short-term and long-term goals of key businesses and organizations within the Historical Triangle, including the City of Williamsburg, York County, and James City County. Such information will help decision makers within the three jurisdictions better understand the issues most relevant to these businesses and organizations as well as both how these key entities view the future of the region and how these views may impact and shape the community in the future. Additionally, this knowledge may be especially helpful as the three local governments within the Historic Triangle prepare for the simultaneous comprehensive planning process in 2012.

Businesses and organizations selected to participate in this project include those that possess the following attributes:

- Employ large numbers of employees locally;
- Own or control significant acreage locally;
- Maintain a large annual budget;
- Own or control major assets;
- Serve significant numbers of customers locally;
- Possess a national headquarters locally;
- Represent businesses or members;
- Maintain international business presence.

In addition to determining the short- and long-term plans of influential businesses and organizations within the region, HTC also desires to determine the extent to which these key entities work to support elements of its vision of ensuring that the region:

- Works collaboratively;
- Respects its natural environment and resources;
- Values its historic heritage;
- Supports its cultural and educational institutions;
- Seeks a balanced economy;
- Offers quality employment opportunities;
- Encourages strong neighborhoods;
- Promotes a healthy community;
- Supports transportation systems and necessary infrastructure.

***Given the sensitive nature of some business and organizational plans, the final report of HTC will ensure confidentiality and will not mention businesses or organizations by name but instead report trends by types of organizations. In this manner, the plans of individual organizations will not be discussed within the final document.***

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Through a careful examination of information gleaned from personal interviews, organizational mission statements, and strategic plans, several pieces of information are important for local decision makers to know in planning the for the long-term goals and vision for the community and ensuring that the community maintains its character and high quality of life.

Key objectives include:

- Interviewing influential businesses and organizations that meet the above criteria;
- Determining the extent of short-term and long-term planning that major area organizations and businesses have engaged in;
- Identifying trends in short-term and long-term plans among participants;
- Analyzing commonalities and differences in the plans of similar organizations and businesses;
- Analyzing to what extent the missions and strategic plans of organizations and businesses examined coincide with the values and goals of the HTC and the localities of which it is composed;
- Maintaining confidentiality of participants in order to maintain their trust and prevent any sensitive information from being divulged.