

# Ford's Colony at Williamsburg

## Situation Assessment 2008

### **Strategic Planning Committee March 2008**

The last Situation Assessment update was published in 2007. This Situation Assessment is written to usher in a new era in Strategic Planning in Ford's Colony that will be dynamic and responsive to the community's ever-changing needs. This document was used as background reading for the FCHOA Board of Directors (FCHOABOD), committee leaders, and invited guests for meetings held on March 28<sup>th</sup> and 31<sup>st</sup> at which the issues identified in the document, along with other issues, were discussed and which will be addressed in the soon to be completed Strategic Plan for 2009-2011.

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# Section I: Situation Scan

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## **INTRODUCTION**

In this section, the information under each major topic area includes:

- An Overview of the Current Situation; Relevant Background Information and Trends
- Planning Assumptions
- Issues to Consider - possible implications for FCHOA

## ECONOMIC ISSUES

### National Economy

The national economy ended 2007 struggling to maintain an “above zero” growth rate of Gross Domestic Product (GDP) and 2008 begins with the continuation of slowdowns in the housing and financial services industries. Housing starts continue at the lowest level in two decades. Sales of existing homes are at the lowest levels in a decade. National and international banks have collectively written off well over \$100 billion attributable to sub-prime and non-performing mortgages and other loans. Experts predict more heavy weather ahead for the big financial services providers; so far they have recognized perhaps only half their eventual losses. Foreclosures on non-performing home mortgages are expected to top one million during the first half of 2008 as the Federal Government tries to formulate methods to partially ameliorate this problem. Finally, America’s old mainstay, consumption, which has bailed us out of many an economic scrape in the past, is faltering as consumers worry about their personal economic prospects. Consumer confidence fell to a five-year low in February.

Is there a recession ahead? Are we already in a recession? Because of the way recessions are measured, usually we can’t tell until it’s over. We do know that in its January, 2008 minutes, the Federal Reserve Open Market Committee reduced its forecast of real GDP growth for 2008 by an additional one half of one percent from its October, 2007 forecast: down to between 1.3 and 2.0%. This forecast is based on further intensification of the housing market correction (37% fewer housing starts than last year and fewer than half as many housing starts as 2005!), tighter credit conditions and higher oil prices. The Fed expects unemployment to increase to around 5.2%. The single piece of good news is that the Fed expects inflation to moderate slightly, to the 2.0 to 2.2% range.

How long is this going to last? Are we looking at a recovery that looks like a V, or a recovery that looks like a U? Apparently, it will take a sustained period to wring out the excesses of the first part of the decade. In January, the Fed was looking for real GDP growth of only 2.1 to 2.7% in 2009 and 2.5 to 3.0% in 2010. Unemployment is expected to hover slightly above 5% during the entire period, with inflation continuing to moderate. However, on March 20 the Organization for Economic Development and Cooperation estimated that the U.S. economy would grow at only a 0.1% rate in the first quarter of this year and that growth would be flat in Q2.

The Fed cut the Federal funds rate twice during January and once again in March in order to provide monetary stimulus and liquidity to the financial markets. Additionally, a fiscal stimulus package, recently signed by the president, provides for a one-time tax rebate in May to most 2007 tax-filers. It is hoped that recipients will use the money to stimulate the economy by quickly spending this money on goods and services. Many experts, however, believe that most will use the windfall to bolster their personal “balance sheets” -- either by paying down debt or by adding to savings. Only time will tell whether these monetary and fiscal measures will have significant effects.

## **Regional and Local Economy**

The news here is less grim. Bolstered by defense spending, military payrolls and expanding cargo tonnage through Hampton Roads, the area's prospects appear to be better than the nation as a whole. Old Dominion University's Economic Forecasting Project predicts regional growth of 2.4% in 2008, with an unemployment rate averaging 3.4% (about the same as Virginia as a whole). However, over the longer term, ODU estimates that between the closure of the Ford plant and the effects of Base Realignment and Closure on the region, gross regional product will eventually be reduced by 2%.

Highway transportation in Hampton Roads is congested and becoming more so. After decades of inattention to transportation by the state, the Hampton Roads Regional Transportation Authority was enabled by act of the General Assembly in 2006. This legislation provided for a prescribed package of capital projects matched by a prescribed bundle of local revenue-producing measures to pay for them, all to be administered by the local Authority, provided that a sufficient number of the affected counties and municipalities voted to participate. Eventually, most of the localities signed on to form the Authority – but with almost all expressing reservations about the project mix, the sources of funding or both. (The prescribed projects directly affecting the local area seem to be limited to widening I-64 from Jefferson Avenue in Newport News to approximately the southeastern end of Route 199 in Williamsburg.) The Authority convened and eventually voted to delay imposition of any of the revenue raising measures pending the 2008 session of the Assembly. Its hope was that the Assembly would revisit the concept, with possible outcomes ranging from elimination of the “abusive driver” fine as a source of revenue to outright elimination of the Authority. As of this writing, the State Supreme Court has found the “delegation” by the General Assembly of taxing authority to another body violates the State Constitution. Thus, with the funding mechanism now unclear, transportation improvements in Hampton Roads will remain stalled until the General Assembly reconsiders the matter. It now appears that the Governor will call a special session to address transportation later this year.

In the Greater Williamsburg area, employment continues strong relative to the state and region, with unemployment equal to 2.9% at year end. The area has a reputation for disproportionate reliance on tourism and hospitality as an underpinning for the local economy. Tourism benefited from the Jamestown 400 celebration during the first half of 2007 and locally, tourism and hotel occupancy were improved over 2006. It remains to be seen whether the momentum from 2007 will carry over to 2008, although there is some optimism that, because Williamsburg is seen as a “drive-to” destination, it may emerge as a preferred vacation destination during an economic slump.

Economic diversification toward higher value-added businesses with low cyclicity is a widely-held goal among community leaders as a means to create higher-paying year-round jobs. A consortium of representatives from William & Mary, Thomas Nelson Community College and the JCC Office of Economic Development will shortly provide one-stop shopping for businesses from an office in New Town. However, it is predicted that over the next ten years, even absent major new employers, there will be 50,000 new locally created jobs without bodies to fill them.

A local trend that has stayed somewhat under the radar is the growth in timeshares. It is anticipated that the number of timeshare units will grow to equal the number of hotel rooms in Greater Williamsburg within the next three to five years. Because the standard residence in timeshares is a week, visitors will have plenty of time to visit a variety of local and regional attractions, shop and dine in local restaurants. While the hotels won't necessarily be happy with this trend, people staying longer and doing more is probably a net positive for the non-lodging portion of the local economy.

The current housing slump in Greater Williamsburg is real. 2007 sales dollar volumes and numbers of closings are down 20 – 23% over 2006 – an unprecedented decline in an area that has always been thought to be well-insulated from the problems in other markets. But, increasingly, our homebuyers are coming to us from out of state – the majority from the mid-west and northeast. However, these prospective local buyers are postponing their relocation decisions pending the sales of their existing homes. It is possible that the provision in the recent Federal fiscal stimulus package which raises the limit for “jumbo” mortgages that may be purchased or guaranteed by Fannie Mae and Freddie Mac will stimulate sales or refinances of more expensive homes. It is also possible that expectations of prices falling further may retard sales. Whatever is happening, local realtors report that January and February existing Williamsburg area home sales have been strong relative to the same period during the past couple of years.

In Ford's Colony, data comparing the second half of 2006 with the second half of 2007 shows not a lot of change: number of homes sold down slightly; average sale price up slightly; median home sale price down slightly; range of sale prices up slightly. In February, 2008 there were over 150 resale homes on the market in Ford's Colony, or about 7.2% of the homes in the community. The median price of homes for sale is \$598,000. Median days on the market is 142. Other communities' approximate percentages of homes on the market: Kingsmill – 2.4%; Governor's Land – 6.5%; Greensprings – 5.4%. Two local realtors independently expressed the opinion that the relative surplus of Ford's Colony homes on the market at the moment is due to their generally high listing prices versus comparable homes in other communities. If they are out of line, then, presumably, Ford's Colony home prices will adjust (downward) over time to their proper relationship with the rest of the community. We'll watch.

Over the longer term, the baby boomers who will begin retiring in large numbers within the next decade must be considered. The slumping economy may cause some to leave the workforce earlier than they planned; or cause them to work a few years longer than planned; but whichever way it goes, they're inevitably headed our way and will support the local real estate market and create additional demand for goods and services. And related to this in-migration, we're going to keep getting older here in Greater Williamsburg: The Virginia Employment Commission projects that our “over 65” population will grow to 20% by 2010; 25% by 2020 and 30% by 2030.

Locally, we're seeing a slow shift in the mix of residential new construction toward multi-family dwellings: condos, town homes and apartments. Partly, this is in response to the desire for more affordable housing, partly because many of us are thought to be looking for simpler lifestyles with fewer outdoor chores and lower utility bills. The new developments at New Town and High Street are seeking to couple these lifestyle advantages with the

availability of goods and services within walking distance. (Some of the units in New Town qualify as, “workforce housing”.)

The commercial real estate market is holding up well, although there is still some question about whether vacancies caused by business relocations to newer space, such as in New Town, will be easily backfilled. The jury is still out on whether the area can currently support the number of additional retail and restaurant establishments which have emerged over the past two or three years.

Local availability of capital remains satisfactory, with the “local” banks (who generally avoided the sub-prime mess) taking the lead. Additionally, we can expect to see national builders take the lead in local construction from custom builders. Because these national builders are, by comparison, very well financed, some of the area custom builders will have to diversify into renovations and additions or perhaps be driven out of business entirely.

### **Planning Assumptions**

- Williamsburg-area resale housing will remain in a slump for the next 12 – 18 months. Housing starts will remain depressed, thus potentially reducing builder impact fees available to the HOA.
- It will take awhile to whittle down the inventory of houses for sale in the community.
- Community amenities distinguish Ford’s Colony from many other residential communities in Greater Williamsburg. Adequate and well-maintained amenities, including the Country Club, are important drivers of the desirability of the community; permit premium prices for Ford’s Colony homes relative to comparable property in other communities; and cause growth in home resale prices to remain a percent or two above other residential areas in the area whose amenities are more modest.

### **Issues to Consider**

- **Low-Maintenance Housing and ECC Standards.** Low-maintenance housing will become more attractive to our residents. This type of housing may not be available within the Ford’s Colony community on any scale. Current ECC building standards tend to discourage for either new construction or retrofitting.
- **Aging in Place Services.** Ford’s Colony residents will continue to get older. Needs for “aging in place” services will grow, especially if residents have difficulty in selling their homes as they attempt to downsize and/or move into “senior residence” situations.

## **GOVERNMENTAL ISSUES**

### **The Structure of Local Government**

James City County (JCC) is in the very heart of the Historic Triangle and thus enjoys a unique place in American history. Here in 1619 the first popularly elected representative government in the New World met, deliberated and of course passed the first tax enacted on these shores. Today we are governed by a Board of five Supervisors each representing a specific district. There are no Supervisors at-Large or said another way no one Supervisor

represents the County as a whole. There is a County Administrator and a County Attorney both of whom answer directly to the Board of Supervisors (BOS) The other county employees are hired, fired and reassigned by and answer directly to the County Administrator.



### **Is The County Ignoring the Will of the People?**

The County, according to its own web site, is dedicated to and will, “.manage growth and balance the needs of development with infrastructure, transportation, the quality of our schools, and the availability of water.” As part of the 2008 Comprehensive Plan revision, two surveys were recently commissioned. The not surprising results indicated:

- 83% of county residents believe land development is occurring too rapidly
- 83% believe there should be restrictions on land sold for both commercial and residential development
- 79% believe that the county should do more to preserve farmland
- 69% believe that developers should always be required to pay a fee
- 61% are willing to accept higher taxes to achieve these goals.

Only 40% of the county population thought the “overall direction JCC is taking” at good or excellent, well below the national benchmark.

### **Sprawl and its Effects**

Clearly the major problem facing JCC is its rapid growth and development often called “Sprawl.” The county’s forests, farmlands, meadows and wetlands are being replaced with more and more subdivisions, typical suburban landscaping, buildings, roads and parking lots. These developments create more impervious surfaces which prevent natural infiltration and absorption of rain water. A significant portion of rainfall in forested watersheds is absorbed into soils (infiltration), is stored as ground water, and is slowly discharged to streams through seeps and springs. Flooding is less significant in forested watersheds because some of the runoff during a storm is absorbed into the ground, thus lessening the amount of runoff into streams during a storm. However, our county is rapidly becoming a developed watershed, In a developed water shed area water arrives in larger volume and more rapidly into streams, resulting in an increased likelihood of more frequent and more severe flooding. In October 2006, for the first time in history, Ford’s Colony experienced flooding from two storms, along News Road, Edinburgh and the West Gate access road virtually isolating a portion of The Colony..( The main stem of Powhatten Creek runs directly through Ford’s Colony). But flooding is not the only problem that results from “Sprawl.”

A natural corollary to increased urbanization and growth is increased population which in turn leads to more problems such as, increased traffic, increased air pollution, water pollution, fuel spills, and the proliferation of lawn chemicals and fertilizers. In addition

more water is consumed for lawn watering and other landscaping activities further straining our already strained water system.

## **Water Supply**

In a recent presentation David Jarman, one of our former Home Owner Association Board Members, states that the public is “blissfully unaware” of the emerging water crises caused by the predicted almost doubling of our population within the next 20 to 25 years. Getting water from two aquifers (one of which contains brackish water which first must be processed through a desalination plant) will meet our projected needs through 2012; thereafter, additional sources will be required. The King William Reservoir will ultimately be a source of additional water but that is not expected until the year 2020. James City Service Authority has a contract with Newport News Waterworks for additional water after 2012. What is unclear is the ability of Newport News to meet the volume required by the projected increased demand.

There are current regulations of water usage in the county by the James City Service Authority (JCSA). Within the Primary Service Area there are:

- Laddered pricing, with higher rates for increased usage
- Alternating day watering restraints during the peak season
- Education efforts aimed at voluntary conservation

Outside the PSA for wells drawing 300,000 gal/day individual wells require approval of the Health Department (for proximity to septic fields) and JCSA (for construction quality). For larger developments (such as Westport) the Virginia Department of Environmental Quality (DEQ) must approve necessary water withdrawal permits.

There are things that individuals and communities can and should do to help forestall the emerging crisis:

- Substantial demand reductions from voluntary conservation: reduce over watering of lawns, use rain meters, drip irrigation systems, rain barrels, native plants and proper mowing practices. Use conservation procedures when showering and bathing, install more efficient dishwashers, washing machines and toilets, and fix dripping faucets.
- Expand the use of so-called gray water (treated wastewater that gets reused for industrial, commercial or agricultural uses rather than discharged into waterways) where feasible.
- Cap future development until we have proof that there are substantive curbs in demand and/or major new sources of supply.

## **The James City County Comprehensive Plan**

The purpose of the Comprehensive Plan is to “guide and accomplish a coordinated, adjusted and harmonious development of an area which will, in accordance with present and probable future needs and resources, best promote the health, safety, morals, order, convenience, prosperity and general welfare of the inhabitants.”

The Comprehensive Plan is general in nature, and with its accompanying maps, plats, charts and descriptive information, shows the locality's long-range recommendations for the general development of the territory. *Virginia Code § 15.2-2223*. Since 1980, every Virginia locality has been required by state law to have a Comprehensive Plan. The last Comprehensive Plan was adopted by JCC in 2003 and is presently being reviewed every five years. In mid-November, the Board of Supervisors (BOS) appointed the Community Participation Team (CPT), a combination of citizens and Planning Commission members who will assist with the County's efforts in collecting and reporting citizen input on the future of the County. Members of the CPT are also available to present at group or neighborhood meetings. The Plan update is scheduled to follow a 22-month timeline with a final version ready for adoption by the BOS in summer 2009.

Once adopted, citizens, developers, County staff, the Planning Commission, and the Board of Supervisors may, but are not required to, use it to develop and implement a course of growth in the County. Essentially, the plan depicts where our community has been, where it is presently, where it wants to go and how it plans to get there.

Another important aspect of the Comprehensive Plan is its Land Use Map. Land Use designations shown on the map assist in interpreting the intent of the Comprehensive Plan and are used with land development standards specific to that designation when the Planning Commission and Board of Supervisors consider certain development proposals, such as rezoning and special use permits. Essentially, a Land Use designation denotes what is seen to be the most appropriate future use and can indicate development intensity for a specific area or parcel.

Some have suggested, with strong support from the developers, a streamlining of the process to develop residential and commercial properties by revising the Land Use map to change R-8 (low density) designations both outside and inside the PSA to R-2 (a higher density designation, 1 to 4 houses per acre). This proposed revision will limit constraints on development and limit the power of the Supervisors to review all rezoning projects. Some suggest a decrease in government review is an unwise and dangerous plan given the water problems, the lack of any meaningful mass transportation system, the inevitable increase in traffic, the inevitable increase in impervious surfaces, the dearth of low income employees and the absence of affordable housing. They believe decreased review of the impact on these already troublesome areas will undoubtedly have an adverse effect on the well being and lifestyle enjoyed in JCC. Others suggest Supervisors, under all the prevailing conditions, should be given more, not less, powers to control growth.

In addition most fiscal impact studies conclude that residential development typically yields an annual fiscal deficit (the difference between the tax revenue the average house produces and the public spending that household generates). Non residential development seems an obvious alternative and that typically generates an initial surplus. But, non-residential development stimulates residential development. In the long run, open space is fiscally better than or equal to nonresidential development. The County has long used a system of proffers to offset some of the costs for schools and roads etc. associated with new construction on rezoned parcels. The state is now considering legislation (SB 768) that if passed will prevent the county from obtaining proffers from developers seeking rezoning and replacing them with impact fees. Counties generally oppose this legislation;

developers strongly support its passage. The matter has been tabled until the 2009 legislative session.

At the density level of one house or more per three acres the character of a neighborhood changes from rural to suburban and the demand for services grows. Schooling is the most sizeable cost, but water systems, parks and recreation, police and fire services and infrastructure maintenance among others all contribute to the costs associated with development. The fiscal effect of very low density development could be positive because the increased demand for services might be low relative to the assessed value of the property, and the assessed value would be sustained by the corresponding preservation of undeveloped open space. As a corollary, if rural low-density development produces almost exclusively high-value properties the county should ensure that affordable housing is available in denser areas of the PSA.

### **Attempted Addition to the Ford's Colony Master Plan - The Warburton Tract**

Presently the Board of Supervisors and the Planning Board have before it a controversial plan which would permit Realtec to add the 180 acre Warburton Tract on News Road near the News Road Gate to the Ford's Colony Master plan so it can construct a Continuing Care Retirement Community (CCRC). Realtec's right to do so is being disputed by many residents of Ford's Colony and by the Ford's Colony Home Owners Association Board of Directors (FCHOABOD).

The background is as follows. The dispute centers on the interpretation of County Ordinance Section 24-283 which provides:

**Additional land area ["CCRC"] may be added to an existing residential planned community [Ford's Colony] if it is adjacent (except for public roads) and forms a logical addition to the existing residential planned community and it is under the sole ownership and control of the developer.**

Realtec, relying on the past interpretation of that section which permitted a developer to add adjacent land to its Master Plan regardless of the continued ownership or control of the Master Plan property, filed an application with the JCC Zoning Board to have the Warburton Tract added to the Ford's Colony Master Plan. All Master Plan amendments must be approved by the Zoning Board and the BOS. The proposal filed consists of 646 independent living units (ILU), 118 assisted living beds (AL) and 180 skilled nursing beds (SN) in a fee-for-services, corporately owned facility. The facility, if built as submitted, would be larger than the combined capacity of the three other continuing care communities now located in Williamsburg combined, and the 18<sup>th</sup> largest such facility in the United States.

The present zoning for the subject property (R-8) would not permit the construction of the proposed facility which requires R-4 zoning. To obtain R-4 the tract must contain at least 400 acres. The Warburton tract is only 180 acres. Realtec, to satisfy density and zoning requirements, seeks to amend Ford's Colony's Master Plan so it can borrow the acreage needed to qualify for the desired R-4 zoning and use the minimal density of Ford's Colony to offset the proposed high density of the CCRC.

The first objections to Realtec's plans were voiced by the Ford's Colony Citizens for Controlled Growth (FCCCG) made up of residents of Ford's Colony. Their principal objections were two-fold:

1. Realtec had neither ownership or control of the area included in the Master Plan sought to be amended. (77% of the acreage and 95% of the assessed value of the property now belong to a myriad of the residents of Ford's Colony and the "control" of the area has been passed to the FCHOABOD); and
2. The fee-for-services, quasi medical, clearly commercial CCRC does not meet the "logical addition" criteria of the ordinance to permit its addition to the single family residence Master Plan of Ford's Colony.

The main objections of the James City County Citizens' Coalition (J4C), a non-profit citizen's action group working to preserve the environmental resources and quality of life in James City County, emphasized four factors:

1. The attempted addition to the Master Plan by Realtec on the same grounds as the FCCCG objected;
2. The potential for increased traffic on News Road; (VDOT has adopted a plan effective July 1, 2008, calling for the submission to it for review and approval of the traffic impact all new subdivisions would have on its area and traffic corridor. This may or may not apply to the CCRC because it was requested prior to that date but has not as yet and probably wouldn't be approved prior to that date.)
3. The potential for flooding which already exists on News Road may be exacerbated by the construction of the CCRC; and
4. Environmental issues.

The FCHOABOD originally took no official position on the issue but attempted to negotiate with Realtec to agree on some acceptable resolution of the festering dispute. Realtec and the FCHOABOD did negotiate an agreement which provides that the residents of the CCRC and the proposed Workforce Housing (which would be a further addition to the Master plan) could not use the amenities or services of Ford's Colony and holds the FCHOA harmless from any claims by such residents who might seek to use those amenities and services.

The Board of Supervisors, alerted to the problem by Planning Board member Tony Obadal and Supervisor Jim Icenhour, both residents of Ford's Colony, appointed a committee to study Section 24-283. Its purpose was to determine if the clear words of the ordinance had been correctly interpreted in the past to permit developer's unfettered expansion. There was then an election and the composition of the BOS changed. The County Attorney, an employee of the BOS then rendered an opinion sustaining Realtec's right to proceed with the change to the Master Plan. That was followed by a ruling by the Zoning Board allowing Realtec to proceed under the old interpretation since it had accepted Realtec's filing under the law as it was interpreted at that time. In other words, if it had been improperly interpreted, perpetuate the mistake. At that point the FCHOABOD voted to appeal that ruling to the Zoning Board of Appeals (ZBA). On February 20, 2008 that appeal was filed. Prior to the hearing date the FCHOA reached an agreement with Realtec

which provided that the appeal to the BZA would be dropped and in return, Realtec agreed to give up its apparent right under the Declaration of Protective Covenants to add land to the FCHOA (except in certain limited situations). The effect of this latter agreement, along with the earlier “hold harmless” agreement is that residents of the proposed CCRC and residents in future developments by Realtec outside the current boundaries of Ford’s Colony, will not be members of the FCHOA nor will they have any rights to use FCHOA facilities in the absence of later specific agreements

It is not clear whether the Board of Supervisors will continue to pursue a clarifying amendment to 24-283

### **The Question of Buffers**

In 1988 the Virginia General Assembly enacted the Chesapeake Bay Preservation Act. The Act requires local governments to include water quality protection measures in their zoning and subdivision ordinances and in their comprehensive plans. In August 1990 James City County adopted the Chesapeake Bay Preservation Ordinance to protect environmentally sensitive lands known as Chesapeake Bay Preservation Areas. The most sensitive of these are called Resource Protection Areas (RPAs). The purposes of RPAs are to retard runoff, prevent erosion, and filter non-point source pollution. The Chesapeake Bay Preservation Ordinance requires that a 100-foot buffer, which is called the Conservation Area component of the Resources Protection Act, be maintained in a manner “that retards runoff, prevents erosion, and filters non point source pollution from runoff.”

RPAs are defined as: tidal wetlands, non-tidal wetlands connected by surface flow and contiguous to tidal wetlands, or water bodies with perennial flow, tidal shores, other lands, a buffer of not less than 100 feet in width landward of these features and along both sides of any water body with perennial flow; lands at or near the shoreline that have an intrinsic water quality value. A naturally vegetated RPA, or buffer, acts as a stream protector, a filter, a transformer, a nutrient sink and a food source. These critical functions enable the RPA to remove pollutants from storm water runoff and to protect the stream or other water body.

The rationale behind the enactment of these provisions is the proximity of RPAs to water bodies. Disturbing them allows more pollutants to enter our waters and, eventually, the Chesapeake Bay. Storm water runoff picks up and carries oil from roads, soil from construction sites, fertilizers and pesticides from farms and lawns, harmful bacteria from pet and farm animal wastes, and trash. In many areas, storm water is one of the leading causes of surface water pollution. In addition, if RPAs are inadequately managed, or if there is no protected stream corridor, other impacts such as stream bank and channel erosion, habitat destruction, and a reduction in the stream’s biodiversity can result.

Local government approval is needed for any buffer modification. Permitted buffer modifications include: the removal or pruning of trees .to provide for sight lines and vistas (pruning tree branches at viewing level can provide the desired view without removing the tree and the water quality protection it provides). When trees are removed they must be replaced with other vegetation that is equally effective in retarding runoff, preventing

erosion and filtering non-point source pollution. Paths shall be constructed and surfaced to control erosion. Also permitted are the removal of dead, diseased, or dying trees and the thinning of trees pursuant to sound horticultural practice. Trees and vegetation may also be removed for shoreline erosion control projects.

Inappropriate buffer modifications include the clearing all vegetation and planting grass, removing all trees in wide swath for sight lines, clearing all vegetation for shoreline erosion control and replanting grass and clearing for the purpose of yard area or construction activities.

Encroachments of up to 50 feet are permitted on pre-1989 lots where application of the buffer area would result in the loss of a buildable area. Encroachments up to 50 feet are also permitted on lots recorded between October 1, 1989 and March 1, 2002 under certain circumstances where application of the buffer area would result in the loss of a buildable area so long as the spirit of the act is recognized.

However, encroachments for new development under these two circumstances are to be the minimum necessary to afford relief for principal structure and necessary utilities. If there is sufficient area outside of the full RPA, then these provisions may not be used to encroach into the buffer area. Some localities require a building setback from the RPA to ensure no encroachments occur. Lots recorded after October 1, 1989 should be large enough outside of entire RPA for all structures including accessory structures: detached decks or garages, pools, gazebos, patios, sheds, etc.

Presently, the Board of Supervisors is reevaluating amendments to the Chesapeake Bay Ordinance which they passed in December 2007 and rescinded in January 2008. These amendments increased buffers on by-right properties along the main stem of Powhatan Creek from 100 feet to a variable buffer up to 300 feet depending upon soil conditions and slopes. It also put 50-foot buffers on perennial streams. At a work session of the Board of Supervisors in February 2008 the supervisors agreed that the amendment would be approved but with a reduced variable buffer of 225 feet. However, it will not take effect until enacted by the affirmative vote of the supervisors at a public hearing so as of this writing, March 22, 2008 the buffer remains at 100 feet. Those opposed to the amendment, including developers, argued that increased buffers around streams imposed by the county were a taking of property without due process or compensation. Those in favor of the buffers argued that buffers provide natural filtration that keeps pollutants out of our waterways and reduce downstream flooding by absorbing storm waters and reducing silt that fills natural holding areas.

### **Williamsburg-James City County Public Schools**

The Williamsburg-James City County Public Schools (WJCC Public Schools) are governed by a 7-member School Board consisting of two Williamsburg City representatives appointed by the Williamsburg City Council and five JCC representatives, one from each election district. The election of County members coincides with the election of members of the Board of Supervisors in the respective districts.

A new James City County and City of Williamsburg five-year school contract was negotiated and went into effect on July 1, 2007. As part of that agreement, the funding formula for new schools will be JCC 96.75% and Williamsburg 3.25%.

In a 10-year period (1998 to 2007), enrollment in the WJCC Public Schools increased by 28% to 10,137 students in 2007. Projected enrollment is estimated to climb by some 1,200 students over the next five years (to a projected enrollment of 11,338 students by 2012), an increase of 11.9% over the 2007 enrollment. A new elementary school and a new middle school are planned to open in September 2010. Based on enrollment projections, there is a possibility that a high school expansion and/or new school will be needed after 2013.

Total resources for WJCC Public Schools are made up of several components; the Operating Budget comprises 54.5%, the Capital Improvement Program fund comprises 41.2%, and the remainder includes Child Nutrition Services Fund, State-Operated Programs Fund and supplemental grant funds.

Since 2005, the Operating Budget has experienced increases of 9 % from 2005 to 2006, 11.5% from 2006 to 2007 and again from 2007 to 2008, and a proposed increase of 4.8% for 2009. For FY 2008-2009, the total Operating Budget will be over \$116 Million, with approximately \$82.7M from local revenue (approximately \$75.6M from James City County and \$7.1M from Williamsburg; \$72.8M from local real estate taxes and \$9.9M from local sales taxes) and the remainder from state revenue.

The Capital Improvement Program (CIP), as adopted by the County Board of Supervisors and the Williamsburg City Council, includes the School Division's Capital Improvement Budget and is an indication of the capital projects that the School Division intends to pursue, the expected timing and approximate cost for each project and program area, and the anticipated levels of capital improvement financing.

Regarding 5-year enrollment and budget projections, the District Superintendent states:

**Significant revenue increases will be needed. Whereas we recognized and appreciate the localities' significant support of the school system, we would be remiss if we did not indicate the challenges that lie ahead. In order to continue to provide the quality education the citizens rightly expect in this growing community, WJCC Public Schools will need significant additional financial support.**

The proposed CIP, including existing and new facilities, includes almost \$88M in FY 2008-2009 and a total proposed CIP (FY09-FY13) of over \$142M. Operating Budget projections show annual increases of 7.3%, 11.3%, 6.9% and 6.6% to a total estimated operating budget of over \$158M in FY 2013.

### **Planning Assumptions**

- Concerns will continue to emerge on a myriad of issues at the County level that will affect directly and indirectly the residents of Ford's Colony.

- The FCHOABOD must liaise with various groups in the county, such as the James City Citizens Coalition (J4Cs) and The Concerned Citizens of Ford's Colony and monitor and at times respond on behalf of the association to the activities of the BOS and Planning Commission related to Developer initiatives and other activities that may impact the community and the citizens of Ford's Colony
- Many residents are not aware of the need to preserve our water supply and improve the quality of water in our streams and bays.
- With continued expansion upstream, such as New Town, High Street and the Prime Outlets the risk of flooding increases. Drainage problems, if any, must be resolved and improvements planned to avoid large scale flooding in the future.

### **Issues to Consider**

- **FCHOABOD Action vs. Encouraging Individual Resident Action.** When should the FCHOABOD take a position and act on behalf of members vs. encouraging residents to be involved as individuals? Should the FCHOABOD develop rules/guidelines/criteria to help determine when it should get directly involved vs. encouraging residents to be involved as individuals?
- **Use of Technology.** Using our new online voting capacity, is it possible to poll the residents on key issues? Must we develop plans to make the residents more aware of this capability, how to use it effectively and its possible impact on future issues before the FCHOABOD?
- **Education of Residents on Environmental Issues and Adoption of Environmental Initiatives.** How should the FCHOA undertake to educate residents regarding the environmental consequences of over-watering or over-fertilizing of lawns? Should the HOA remove restrictions on rain barrels and rain gardens?
- **Flooding Concerns.** Should the FCHOA assess the risk of continued flooding and, if the risk of flooding exists, take steps necessary to improve drainage and prevent damaging floods?

## **TECHNOLOGY**

### **Energy Availability**

Depending on the success of conservation and efficiency efforts over the next ten years, it is estimated that Dominion Virginia will need to increase its electric generation capacity from 13% to as much as 28% (or as many as 5100 megawatts) to meet demand for electric power in Virginia. It has plans to construct a combination of fossil fuel and nuclear plants to meet these requirements. The national electrical power grid is seen as increasingly fragile, subject to sudden and sometimes-widespread power outages caused by fires, storms or other natural occurrences. (Many Ford's Colony residents attempted to reduce this risk by obtaining gasoline or natural gas-fueled generators following Hurricane Isabel.) Distribution of additional power generated here in Virginia will require additional transmission lines into the Hampton Roads area and, notwithstanding the necessity, will undoubtedly stimulate some level of public opposition and delay.

Natural gas supplies would appear adequate over the planning period. Virginia lies at the northern end of the pipeline which brings Gulf of Mexico natural gas to northern markets. The state relies on this and a network of transmission lines to distribute this gas throughout the state. Critical natural gas infrastructure needs include an additional pipeline across the James River in Hampton Roads and, potentially, pipeline infrastructure to provide supply to additional electrical power generation plants. The state is seen as a viable candidate for LNG imports through its Hampton Roads ports (more public opposition). Additional gathering and compression facilities will be needed to support future in-state gas wells.

Renewable liquid fuels will become increasingly available. According to the Virginia Energy Plan, annual in-state ethanol production will increase to 300 million gallons and bio-diesel production to 120 million gallons by 2017.

### **Residential Energy Alternatives**

It's all about the price of oil. Bursts of interest in development of affordable alternative energy sources have punctuated the past four decades, only to be abandoned when it appeared that oil prices would moderate and availability would remain high. So, although "active" solar energy systems (hot water and photovoltaic) have been around since the '70's, we haven't seen any important advances in this technology. While commercial and industrial applications have perked up a bit recently, interest in residential systems has remained low due to high installation cost and extended "payback" compared with more conventional energy sources. With increased demand for systems, production economies of scale and increased competition among installation contractors could favorably influence the "payback" economics. And some with the means to do so might be interested in installing a solar system just because "it's the right thing to do." Dominion Virginia has a program to permit homeowners with solar generation capability to sell unused power back into its network, although currently there are only a handful of participants statewide. However, at the moment, existing Ford's Colony ECC construction guidelines would likely not permit most roof-mounted solar systems.

A second technology which has long been available but infrequently utilized is geothermal – where constant temperature well water is used to heat or cool the home. While there are a few geothermal systems in use here in Ford's Colony, generally, the technology suffers from the same problem as solar: the price is too high, the payback period too long. But, again, economies of scale and competition could make geothermal more attractive.

### **Residential Construction**

Look for new residential construction to become "greener". Virginia currently uses the International Building Code, which includes energy-saving requirements. The state updates its codes every three years, always tightening up the environmental side. Counties may establish local codes which are more restrictive than the state code.

The U.S. Green Building Council has published a set of voluntary construction standards known as, "Leadership in Energy and Environment Design" or LEEDS. These standards, which currently apply to industrial and commercial construction and to multifamily residential construction over four habitable levels in height, are currently being applied by James City County for all County buildings and for all buildings which require legislative

approval. The standards cover everything from site selection (proximity of public transportation, shopping facilities, sidewalks) to construction materials to handling of construction waste to landscaping through the education of occupants.

On the residential side, Earthcraft Home Virginia has established construction standards akin to LEEDS but which apply to residential housing of less than four stories. Residential builders who wish to build Earthcraft homes must apply to join the organization, undergo training and have a design review with an association technical advisor. There are at least two local builders who are approved to construct Earthcraft homes. One of these, A. DeRose & Sons, is active in Ford's Colony. It is likely, within the next several years, that James City County will adopt some of Earthcraft's building standards in its residential building codes.

### **Vehicle Technology**

Whether the push to replace gasoline with ethanol will maintain traction is unclear as controversy exists about whether the cost, the petroleum consumption, the carbon footprint associated with production and combustion actually make ethanol superior to gasoline as a fuel. However, vehicle engine technologies already exist (hybrids), or are on the horizon, which substitute electricity for gasoline combustion. Such vehicles could receive preference when vehicles in Ford's Colony's security and maintenance fleets need replacement. At least theoretically, residents could equip electric golf carts for street use and use them for commutation within the community.

### **Information Technology**

Over the next few years, increased use and influence of "Web 2.0" will have an impact on communications and governance. Web 2.0 sites are those whose value is created from the actions of users. Users add value by adding content. For example: rating a book or restaurant or vendor; blogs; collaborative content developed into a knowledge base. Web 2.0 extends the reach of communication, and shifts the balance of power in many ways.

Because of the availability of social computing, consumers will expect and demand increased transparency in decision-making processes. Increasingly, citizens (especially busy professionals and younger people) will seek ways of participating in the discussion of issues without being present in face-to-face meetings. Self-forming, peer-governed communities will be formed in greater numbers to address issues, opportunities and challenges related to values, quality of life, and protection of property values.

### **Aging in Place**

An intriguing new state-wide initiative called, "No Wrong Door" is planned to be piloted locally by the Peninsula Agency on Aging. This program, using a HIPPA-compliant database, will create a "one stop" service approach designed to provide coordination of client information, service referral and case management. As envisioned, basic client information gets entered once and then may be used to match the client's needs against up to the minute available products and services offered by any of the 7,000 public and private Virginia agencies serving the elderly and disabled. For example, a client whose record indicates a need for elder day care will get (or her case manager will get) real time

information on available day care slots, or transportation assistance, or home delivered meals. Data becomes available to each provider who will supply service to the individual so there will be no need for the client to repeat the same story to a provider. As an example, client information may be entered by a hospital discharge manager and immediately be available to the visiting nurse and provider of housekeeping services selected by the client for follow up services. Entries by the provider relating to the individual also become a part of the individual's record, so that the next provider has benefit of all relevant information accumulated on the client from whatever source. No Wrong Door is still in the design phase, with local rollout sometime in 2009. Opportunities for citizen participation in the project's Advisory Board may be available. In the meantime, information and referral sources for seniors include the web-based [www.seniornavigator.org](http://www.seniornavigator.org) or the local Peninsula Association on Aging.

### **Planning Assumptions**

- Presuming steady progress in building additional electric and natural gas infrastructure and in electric conservation, local supplies of these utilities should be adequate during the planning period.
- Building codes for new construction and renovation will increasingly emphasize energy efficiency and conservation.
- Internet applications will continue to expand as a means to disseminate information to and obtain information from property owners.

### **Issues to Consider**

- **Energy Efficiency.** \$5 per gallon gasoline will concentrate our attention on rotation of the existing Ford's Colony automotive fleet to more economical vehicles. Residents may become interested in small electric vehicles for transportation within the community. Demand may emerge for certain types of services within the community: e.g. post office, convenience store, ATM, etc. which would be within easy commute.
- **Up-To-Date Environmental (Green) Standards.** Should environmental standards be reviewed/revised to ensure they address green design and architecture in line with an appropriate focus on conservation and the natural environment? E.g., energy efficiency in new homes and remodeling (metal roofs, skylights, efficient windows and heating and cooling systems, solar panels), native landscaping, storm water runoff, rain barrels, etc. Although the FCHOA does not have control over ECC standards, should the Association address evolving homeowner interests with the Developer/ECC?
- **Partnering for In-Home Services.** Services which make it easier for elderly residents to remain in their existing homes will become more and more popular. The community could consider partnering with agencies providing such services: for example by negotiating lower rates in exchange for office space within the community.
- **Social Networking.** Are there ways in which the FCHOA can utilize interactive websites to enhance the sharing of information and building trust and relationships? What opportunities and challenges are presented by interactive websites? For example, issues to be addressed by the FCHOABOD could be posted for community input and discussion prior to FCHOABOD dialogue and deliberation. Or a blog could be set up

where residents could rate builders, remodelers, contractors, locations for wine-and-dines, etc.

## **SOCIAL, DEMOGRAPHIC AND CONSUMER VALUES**

### **Market Targets and Demographics of Ford's Colony**

The Developer has found that the average demographics of the buyer have changed little for more than 30 years in planned communities featuring golf. The average buyer is 54 years old, married, affluent, and successful in a working career. The average buyer has moved to Ford's Colony in six to seven years, and is generally not affected by swings in the economy in deciding when to purchase, when to retire from the current job, and when to move to Ford's Colony. According to the Developer, the target market and anticipated demographics for Eaglescliffe, Westport and Knob Hill are not different from what has been standard.

The targeted market continues to grow in numbers. The first wave of baby boomers has recently turned 60. The largest wave of retirees, with a span of 15 years (2025), has yet to reach the average retirement period of 62-67 years.

Accurate data on the demographics of Ford's Colony at Williamsburg will not be available until the census survey is completed later this year. Based on surveys of new residents conducted by Ford's Colony Security, the number of families with school-age children has tracked steadily at about 10%. Most of the rest are retired, semi-retired, or empty nesters.

### **Health Care in the Community**

The quality, breadth and availability of health care are important to the residents of Ford's Colony. Riverside has been attempting to obtain state permission to locate a hospital in the Williamsburg community area, but has been unsuccessful up to this point. Sentara has recently opened Sentara Urgent Care in New Town, offering non-emergency care through four physicians with access to lab work, digital x-ray and a variety of other diagnostic tests. The home health care business is growing rapidly in the greater Williamsburg area.

### **Changing Interests and Needs of Residents**

Residents are living longer and are living a more active lifestyle, including extensive travel, volunteer activities in a variety of charitable organizations, and social activities. More residents include spouses (wives) that had working careers and still want to be involved beyond caring for the home and charitable organizations.

Because they are living longer, some residents expect to downsize their home at some point, desire lower levels of maintenance, or seek assisted care. Some are leaving Ford's Colony to accommodate their aging lifestyle needs after residing among their friends for 15 to 20 years. New Town and perhaps High Street offer a different lifestyle that may appeal to some.

Ford's Colony Security is receiving more requests for checking in with elderly living alone, keeping track of those with critical needs such as oxygen, equipment monitors, and heat/air conditioning in the event of power outages.

Many residents spend significant time traveling, and therefore are not be at home for extended periods of time. (The Gazette reports an average of 15% of their subscribers have their subscription on hold for the greater Williamsburg area; the data for Ford's Colony is likely higher.)

### **Planning Assumptions**

- The number of residents will continue to increase; the rate of increase will depend on the economy and the local real estate market.
- The demographics of Ford's Colony will not change significantly over the next few years. However, the new projects of Eagles Cliff, Knob Hill, and Westport may attract a somewhat different buyer even though the target market of the Developer is the same. Residents of these three communities will have Social Membership status in the Ford's Colony Country Club as part of their membership in their sub-association. (The sub-association will have a contract with the FCCC for social memberships.)
- As the number of residents grows, different segments of the community - young families with children, couples with at least one working, retirees, and those "aging-in-place" - will be interested in association services related to their needs and circumstances.
- Services that make it easier for elderly residents to remain in their existing homes will become more and more popular.

### **Issues to Consider**

- **Desired Amenities in the Future.** What amenities and services will be most important to future buyers and residents of Ford's Colony? Will social gathering places such as coffee shops and bookstores be more attractive? Or indoor recreational and exercise facilities?
- **Services for Older Residents.** As the demographics of the community become older, what services will be needed/desired to accommodate their interests? For example, would it make sense for the HOA to contract with a specific provider for lower-cost home health care services for residents? The community could consider partnering with agencies providing such services: for example by negotiating lower rates in exchange for office space within the community.
- **Family-Oriented Programs.** What do younger families desire related to quality of life? What types of programs would be beneficial to families (e.g. more youth activities, adopted grandparent program, etc.)?

## **DEVELOPER PLANS**

Despite the economic downturn and the slowing of construction starts and sales in Ford's Colony the Developer remains optimistic about Ford's Colony Williamsburg.

The status of its ongoing projects is as follows:

**Eaglescliffe** is the Condominium development located across from the Country Club clubhouse. It will, when completed, have 84 Condominium units in 7 buildings; the first building consisting of 12 units is complete. The first closings are scheduled for March

2008. The foundation and steel work on building two have been started. The first projected closing date for building 2 is November 2008. Sale prices range from \$500,000 to \$650,000. The residents of Buildings 1 and 2 will be assessment paying members of the Ford's Colony Home Owners Association (FCHOA) and a sub-association, Eaglescliffe Condominium 1 Association. For legal reason new Condominium Associations will be formed as buildings 3-7 are completed. When all are completed an amalgamated association may be created. These associations will be responsible for the maintenance of the building's skin and interiors. In addition the residents will be members of the Eaglescliffe-Knob Hill Neighborhood Association (EKHNA). This association will be responsible for areas of mutual use such as parking lots. Eaglescliffe's amenities in Eaglescliffe will include gardens, fountains and a walking trail, Social Membership in the Ford's Colony Country Club (FCCC) and membership in the Spa to be constructed. The amenities will not be open to other Ford's Colony residents but the present or improved Ford's Colony amenities will be open to the Eaglescliffe residents.

**Westport** is the development to be constructed across from the Manchester Gate on Centerville Road. Preliminary approval obtained from the county includes 102 Single family residences on 3 to 5 acre lots in the 430 acre tract, parts of which are located both within and without the Prime Service Area (PSA). It is contemplated that Phase One will include lots 5-47 outside the PSA. Presently the Developer anticipates seeking rezoning of 50 acres within the PSA from 3 acre lots to a combination of approximately 40 single family lots and 50 townhouses. While Realtec has not ceded to the Ford's Colony Home Owners Association Board of Directors (FCHOABOD) the right to control any of its developments, preliminary plans for this area in which rezoning is required have been given to it for review and comment,

By the time you read this Phase One should have begun; it is scheduled to start in mid-March 2008; with sales commencing in April 08. The application for the rezoning of the areas inside the PSA is contemplated for fall 2008. The start and opening of sales in Phase Two is dependent on the sales in Phase One.

Single family lots outside the PSA are 3-5 acres, Single family lots inside the PSA are planned at ¼ acre. Townhouses are planned at 1800-2400 Sq. Ft. The offering price of the lots in Phase One will be between \$275,000 and \$600,000.

The 3-5 acre lots are zoned A-1 and are not an official component of the Ford's Colony Master Plan as defined by James City County. The entire 430 acre parcel was, however, made subject to the Ford's Colony Home Owner's Association (FCHOA) Declaration in 2005. Owners of lots in Westport are part of the FCHOA as well as a sub-association to be known as Westport Neighborhood Association.

The amenities planned include parks, a small floating dock affording access to Gordon Creek, outdoor areas for games such as shuffle board and croquet, a BBQ patio area and an indoor meeting and activities building. In addition the residents will be Social Members of the FCCC and the Spa. The recreational facilities will be open to all Ford's Colony residents and all Ford's Colony facilities will be open to the residents of Westport.

**Knob Hill** is the area off Ford's Colony Drive near the Country Club consisting of nine, 1 to 1.5 acres single family residence lots priced from \$300,000 to \$600,000. The development infrastructure has been completed and fifty percent of the lots have been sold; one house is completed. Knob Hill is included in the Ford's Colony Master Plan and is a part of the FCHOA. It also has a sub-association, Eaglescliffe-Knob Hill Neighborhood Association (EKHNA), whose members are Social Members of the FCCC and members of the Spa. They are also entitled to use all of the amenities of Ford's Colony.

### **Continuing Care Retirement Community (CCRC)**

While Realtec has sought to add the 180 acre Warburton Tract on which it hopes to build a Continuing Care Retirement Community to the Ford's Colony Master Plan, its inclusion is being disputed by many residents of Ford's Colony and by the FCHOABOD (See previous section). Negotiations are continuing which may lead to an amicable resolution of this dispute.

The plan for the facility includes 646 independent living units (ILU), 118 assisted living beds (AL) and 180 skilled nursing beds (SN) in a fee-for-services, corporately owned facility, the construction of which will be in at least four phases. Under state law construction on each phase cannot commence until at least 50% of that phase is pre-reserved. Typical lenders require at least 70% to be pre-reserved. The Developer hopes to start infrastructure and phase one construction in summer 2009 with occupancy in summer 2011. Reservations are projected to begin in fall 2008.

The ILUs will range in size between 950 to 1600 sq. ft. flats and 1800 to 2200 sq. ft. cottages. Prices are presently being reviewed in a marketing update including refundable options. Of course, local comparables with Williamsburg Landing and Windsor Meade will be considered.

Residents of the CCRC will not be members of the FCHOA as per the hold harmless agreement with the FCHOA. Any relationship will be contractual between the CCRC and the FCHOA.

The following amenities and services are contemplated for marketing release: walking trails, gardens, reflection pools, game areas, private bus service for both internal and external destinations and private security. The indoor amenities will include a pool, exercise facilities, craft and hobby rooms, restaurants and lounges, chapel, a major meeting and activities building, meeting and activities rooms, shops, mail room, pharmacy, bank, laundry and dry cleaning service, maid service, health clinics, activities coordinator, vacation and travel coordinator, and others depending on resident feedback,

The demographics differ from the typical Ford's Colony resident (See p. 1, Supra). The anticipated average age entering ILUs nationally is 78 years old, 50% single (up from 72 years and 30% single 10 years ago). The residents will have an affluent net worth with private long-term health insurance.

## **Work Force Housing**

Realtec has not as yet submitted a conceptual plan to JCC. The Developer reports that JCC does not have an ordinance that addresses the practical needs of a Work Force Housing community plan (JCC has recently sponsored a task force to address this issue (Realtec is a member).) R-4 zoning with 240-250 units was discussed to provide density and design flexibility for an economic scale for units priced 50% at \$160,000-\$200,000 and 50% at \$200,000 to \$350,000.

## **Other Developer Projects**

Although there are no other projects presently being actively pursued, the Developer advises that the Master Plan anticipates additional condominiums adjacent to the country club. No further information is available at this time, except that there are no plans to include the condominiums in the FCHOA; all Condominiums will have an association for maintenance. Section 34B is also a planned condominium community on Ford's Colony Drive across from Knob Hill. Potentially this is similar to Eaglescliffe. At present the plan is to add this community to the FCHOA, but that is subject to change because of the current concerns of the FCHOABOD. The Developer also owns a parcel on the corner of Longhill Road and Ford's Colony Drive (across from the sales office) which is designated commercial; there are no plans for its development at this time.

The Manchester Gate is in the design comment period. Construction is planned to start in spring 2008 The FCHOA has requested that it approve the design in advance of construction. The Spa is in the concept phase only. Design is scheduled to start in 2008 or 2009.

## **Sub-Associations and the FCHOA**

Every owner of a unit (residence or lot) in Ford's Colony is a member of the FCHOA. Some owners are also members of a sub-association (e.g., The Links, Nottingham Place Neighborhood Association). These sub-associations exist for various reasons, including maintenance of the exterior of the residence and yard, maintenance of the common elements of the subdivision, and contractual arrangements. They have a separate Board of Directors and may have a different Management Agent. Except for those specific provisions included in the Supplemental Declaration and Bylaws for that subdivision, all of the Covenants, Bylaws, and rules/resolutions of the FCHOA, also known as the Master Association, apply to the members of a sub-association.

## **Planning Assumptions**

- The FCHOABOD should be actively engaged in dialogue with the Developer regarding future plans and to evaluate their impact on the amenities and lifestyle enjoyed by the residents of Ford's Colony.
- As the Developer completes condominium and other projects, the number of sub-associations will grow, which will require effective communication and cooperation between and among the associations and the FCHOABOD

- Additional amenities and improved maintenance of current facilities will be needed to accommodate the growing population of Ford's Colony.

### **Issues to Consider**

- **Addressing Developer Plans.** The FCHOABOD, as well as many residents, has actively followed Developer plans and the potential impact of those plans on FCHOA and residents. What role should the FCHOABOD play in the future? Are current structures and processes sufficient to support the FCHOABOD in meeting the needs and expectations of homeowners related to Developer plans, particularly in light of anticipated growth in the number of homeowners over the next few years?
- **Funding the Maintenance and Expansion of Amenities.** Should the FCHOABOD establish a special fund akin to the Capital Reserve Fund to fund a revised schedule for amenities maintenance and redecorating? Will the present Capital Reserve Fund be sufficient to replace and upgrade current amenities as needed?

## **FORD'S COLONY COUNTRY CLUB**

### **Current Situation**

Ford's Colony Country Club (FCCC) is a privately owned (by Realtec, Inc) 54-hole golf complex consisting of 3 championship golf courses, practice facilities, a pro shop and 3 restaurants, two of which are open to all residents of Ford's Colony and the public. The Grill Room is restricted to Country Club members. Two of our three golf courses have always been reserved for Member and Association (LGA, MGA) play. Seventy-five thousand rounds of golf were played on the three courses last year.

At the present time, there are 1,027 members of whom 669 are full golf members (local 458, out of town 211), 83 individuals who are members by reason of 20 corporate memberships, 184 social with limited golf and associate members, and 91 social memberships. Commencing April 1, 2009, initiation fees for full golf membership will be \$22,500 for applicants who purchased through Realtec, \$30,000 for others; limited golf membership \$12,500; and social membership \$3,500.

At the end of last year because of an intramural dispute, 32 limited golf members resigned from the club. The vast majority of that class of members remained. Beginning last fall through March 2008, the club instituted a membership drive by significantly lowering initiation fees and First Choice, Realtec's resale arm, reduced barriers to sales by outside realtors by reducing the differential between initiation fees payable by customers purchasing through First Choice and those who purchased through other realtors. Outside realtors like this arrangement. It is estimated that the net effect of all this plus the conversion of some limited golf members to full golf members and the pre-planned increase in dues leaves the club in approximately the same financial position as last year. It also appears the intramural squabble is well on the road to being resolved.

At present there are no plans for any new additions or major renovations. Their present priority is to become more member oriented and more consistent, particularly in the food, beverage and service areas in all restaurants.

The Ford family's goal has always been that the golf courses and country club be a self sustaining entity. While they are gaining on that goal, it has not as yet been achieved and Realtec will continue, in a hopefully declining fashion, to help out where it must to keep the country club the asset that it has been in the past.

The existence of the Country Club as a highly regarded golf venue is inextricably linked to the property values in Ford's Colony. Happily, the prospects for the continued flourishing of the Country Club seem bright. It is to all of our best interests that it remains so.

### **National Trends in Golf**

According to the National Golf Foundation and the Sporting Goods Manufacturers Association, the total number of people who play golf has declined or remained flat each year since 2000. The number of people who play 25 times a year or more fell to 4.6 million in 2005 from 6.9 million in 2000, a loss of about a third. Women make up about 25 percent of golfers nationally.

In many parts of the country, high expectations for growth in golf paralleling baby boomer retirements has led to what is now considered a vast overbuilding of golf courses. According to the National Golf Foundation, several hundred have closed in the last few years, most of them in Arizona, Florida, Michigan and South Carolina.

Golf course owners are exploring a variety of strategies to attract players: recruiting young players with high school tournaments; attracting families with special rates; realigning courses to 6-hole rounds; expanding facilities to accommodate events and weddings; seeking tax breaks on the premise that even private golf courses provide publicly beneficial open space. In some locations, residents of the surrounding neighborhood have complained about party and music noise from expanded functions at clubs in residential neighborhoods.

The decline in the number of golfers over the past several years is part of a broader decline in outdoor activities - including tennis, swimming, hiking, biking and downhill skiing - according to a number of academic and recreation industry studies.

### **Golf Courses and the Ford's Colony Master Plan**

There have occasionally been unfounded rumors about the possibility of development of the golf courses at some point in the future, and it may be helpful to set out the facts as they exist. The golf course property is shown on the Ford's Colony at Williamsburg Master Plan of development as commercial property. Each various component was approved as a commercial Site Plan. It would require, first, a Master Plan Amendment approved by the James City County Board of Supervisors, then second, a residential subdivision (single family) or residential site plan (condo) approved by the Planning Commission. It is not impossible, but seems unlikely. Even catastrophic financial events would seem to suggest that the lenders would take over and sell the facility, probably to a golf management company. The covenants of Ford's Colony do not provide the homeowners with a right of first refusal to purchase the club/golf courses before it would be offered to the public.

## Planning Assumptions

- Although the Ford's Colony Country Club is independent of the FCHOA, the FCCC will continue to have a significant impact on property values in terms of attracting potential buyers of homes and in the landscaping and beauty of the community. Therefore, success of the Club will be important to all residents whether or not they are members of the Club.

## Issues to Consider

- **Understanding Importance of FCCC to Property Values.** Responses in the Customer Satisfaction Survey to the statement "The presence of the Ford's Colony Country Club enhances property values" are varied. The percentage of respondents (16%) who said this statement was only "Somewhat Important" or "Not Important" was higher than the percentage to any other statement in the survey. On the other hand, 62% of respondents indicated "Essential" or "Very Important." Should the Association seek to increase understanding among **all** residents of the relationship between FCCC success and property values?
- **Shared Space.** Could FCHOA and the FCCC both benefit by sharing the cost of additional facilities? As Westport, Eaglescliffe, Knob Hill, etc. are developed and contribute social members to the club, the capacity of existing club restaurant and meeting facilities will be tested.
- **Continued Operation of Country Club.** The success of the FCCC is important to both the Developer (especially while they are still selling lots) and the homeowners. Any change to the commercial Site Plan status of the golf courses would require a Master Plan Amendment and approval by the Planning Commission) to protect the interests of homeowners. Does this provide the homeowners with sufficient protection from (a) commercial use that could be detrimental to the community or (b) even the remote possibility of additional development by selling lots or building homes on the golf courses in the future? What alternatives might be available to the HOA in the event that club ownership elected to cease operations and stop maintaining the courses?

# Section II: Review of Progress 2006 Strategic Plan

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## **INTRODUCTION**

In this section, the information under each Area of Strategic Importance includes:

- The current Goal from the 2006 Strategic Plan
- An Overview of the Current Status of Objectives
- Customer Satisfaction Survey Results related to the goal and objectives
- Planning Assumptions
- Issues to Consider - possible implications for FCHOA

## **GOVERNANCE**

**CURRENT GOAL: Establish and use best practices in governing the Ford's Colony at Williamsburg Homeowners Association.**

### **Overview of Current Status of Objectives**

#### **Objective 1: Develop an effective structure for the FCHOA Board of Directors.**

In 2007, the FCHOABOD was expanded from five to seven members. The FCHOABOD also conducted a review of the organizational structure of standing and ad hoc committees and made some adjustments. The FCHOABOD approved modifications to the charter of the Nominating Committee to make it a continuous standing committee and to expand its role to include development of volunteer resources.

In 2<sup>nd</sup> Q 08, the FCHOABOD will evaluate board terms after one year with the larger 7-person board and decide whether any changes to the current two-year term with no more than two consecutive terms should be made.

#### **Objective 2: Encourage resident participation in standing and ad hoc committees.**

In 2007, the Nominating Committee established a volunteer database and the Communications Committee published a series of articles in TOC describing the role/function of each standing committee, developed an online volunteer registration form, and implemented an online FCHOABOD application form. The Nominating Committee also established a web site that allows property owners to obtain information about various volunteer opportunities and register their preferences as a volunteer. Annually, the Nominating Committee will participate in the Club Fair in September to promote awareness and interest in all standing committees.

Approximately 75 residents serve on the FCHOABOD or its advisory committees. Another 10 or so serve in an ad hoc capacity.

#### **Objective 3: Conduct a review of all FCHOA and sub-association governing documents to assure that they meet current legal standards and respond to the FCHOA current and future needs.**

Sub-associations are in place for the Links and Nottingham Place, and will be established for Eaglescliffe/Knob Hill and Westport. Action plans to review FCHOA Governing and Sub-Association documents have not yet been initiated.

#### **Objective 4: Enhance opportunities for communication and cooperation between the FCHOA and sub-associations within Ford's Colony.**

Initial contacts to Advisory Councils of the Sub-Associations were made and this will be an ongoing effort to pursue communication and cooperation.

#### **Objective 5: Continue an active dialogue with the Developer regarding annexations to, and developments within, Ford's Colony and proposed changes to the Master Plan.**

The FCHOABOD finalized an agreement with the Developer regarding protection of the FCHOA as the Developer proceeds with plans. The Developer has made a commitment to provide the FCHOABOD with information on Developer plans that may impact the community. The Ad Hoc Committee to Review Developer Expansion was dissolved and a FCHOABOD sub-committee was established to engage in negotiations with the Developer.

**Objective 6: If the Developer decides to discontinue managing the responsibilities of the ECC, develop a contingency plan to transition control of the Environmental Control Committee (ECC) to the FCHOA. In the interim, promote greater dialogue between the homeowners and the ECC.**

The Developer has not indicated any interest in discontinuing the responsibilities of the ECC. In the Customer Satisfaction Survey completed late in 2007, residents expressed some concern regarding the lack of consistent application of architectural standards on new construction and renovations. Discussions have been held with the Developer requesting information on apparent inconsistent application of standards in specific situations.

**Related Customer Satisfaction Survey Results**

Statements in the recently completed Customer Satisfaction Survey related to this goal received the following **importance** vs. **satisfaction** ratings (on a 5-point scale):

- “Homeowners concerns and complaints receive an effective response.” (4.38 vs. 3.52)
- “Realtec’s development plans are communicated to the homeowners.” (4.37 vs. 3.13)
- “Architectural standards are consistently applied on new construction and renovation.” (4.26 vs. 3.26)
- “Homeowners receive adequate and timely information from the Board and Standing Committees.” (4.15 vs. 3.81)
- “Frequency and content of Town Hall meetings are adequate.” (3.74 vs. 3.92)
- “Residents are encouraged to participate on committees.” (3.50 importance vs. 4.16 satisfaction)

**Planning Assumptions**

- The FCHOABOD will continue to assess its committee and task force structure for ‘fit’ with the strategic plan and the operational needs of the FCHOA, and will make adjustments or refinements as deemed appropriate to enhance the effectiveness and efficiency of the Association.
- Residents will continue to possess a wealth of talent and experience that will serve the Association well. Standing and ad hoc committees will continue to be important for FCHOA to achieve its vision of being an outstanding residential community. The use of volunteers in the work of the FCHOA will enhance the strong sense of community, build trust and communication with residents, and support the Association’s capacity to operate services in a cost-effective manner.

- Finding residents willing to provide time and energy to Association standing and ad hoc committees and to serve on the FCHOA Board will continue to be a challenge. Volunteer experiences will need to be rewarding (providing a sense of meaningful contribution; able to make a difference) and reasonable in expectations/demands on time.
- As the number of sub-associations grows, effective relationships among the sub-associations and the FCHOA will be important.
- The FCHOABOD will need to be actively engaged in dialogue with the Developer regarding future plans. Additionally, the FCHOABOD will need to stay in touch with the James City County Citizen's Coalition (J4C) and carefully monitor (and perhaps respond on behalf of the Association) activities of the James City County Board of Supervisors and Planning Commission related to Developer initiatives and any other activities that may impact the community and residents of Ford's Colony at Williamsburg.
- For the foreseeable future, the Developer will continue to manage the responsibilities of the Environmental Control Committee (ECC).
- Two keys to future success of the FCHOA will be 1) an enjoyable volunteer culture, and 2) a nimble infrastructure that allows the association to quickly seize opportunities and address issues and challenges. Trust will be an important factor in both of these. Prerequisites for a culture of trust include clarity and consensus on what constitutes success (a shared vision) and open access to common information (transparency).

### Issues to Consider

- **Addressing Developer Plans.** The FCHOABOD, as well as many residents, has actively followed Developer plans and the potential impact of those plans on FCHOA and residents. What role should the FCHOABOD play in the future? Are current structures and processes sufficient to support the FCHOABOD in meeting the needs and expectations of homeowners related to Developer plans, particularly in light of anticipated growth in the number of homeowners over the next few years?
- **FCHOABOD Action vs. Encouraging Individual Resident Action.** When should the FCHOABOD, on behalf of members, get involved in taking a position vs. encouraging residents to be involved as individuals? Should the FCHOABOD develop rules/guidelines/criteria to help determine when it should get directly involved vs. encouraging residents to be involved as individuals?
- **Future Volunteer and Staffing Roles.** To what extent and in what roles can the FCHOA rely on volunteers in the future? What combination of staff and volunteers will be needed/ desired at strategic, tactical, and operational levels?
- **Influence with ECC.** Residents have expressed concerns - individually and in the Customer Satisfaction Survey - regarding the lack of consistent application of architectural standards on new construction and renovations. Assuming the Developer will continue to manage the responsibilities of the ECC, how should the FCHOA address resident concerns? Long-range, is FCHOA interested in having control of the ECC?

- **Addressing Homeowner Concerns.** Based on the Customer Satisfaction Survey results, a number of homeowners do not feel their concerns and complaints receive an effective response. Should this issue be addressed and, if so, how?
- **Monitoring Local Issues.** Is the current process of monitoring key local issues sufficient to keep the FCHOABOD and residents informed? Should the process be modified?
- **Effective Communication and Building Trust between FCHOABOD and Residents.** Are there ways in which communication among the FCHOABOD, committees and residents can be enhanced? How can trust be enhanced? Based on the results of the Customer Satisfaction Survey, effective and timely communication with residents continues to be a challenge. In the past two years, there have been at least three issues where communication with residents has been a challenge, specifically: (1) facilities - lack of understanding of decisions of past FCHOA boards and Advisory Committees; (2) the capitalization fee issue; and (3) developer plans.

## **PRESERVATION, PROTECTION, MAINTENANCE AND ENHANCEMENT OF PROPERTY VALUES**

**CURRENT GOAL: Preserve and enhance property values and the natural environment to maintain Ford's Colony's status as an outstanding residential community.**

### **Overview of Current Status of Objectives**

**Objective 1: Maintain and develop common areas with standards consistent with Ford's Colony's status as an outstanding residential community.**

The HOA approved the formation of a Beautification Sub-Committee in October 2007 whose mission is to maintain and enhance the natural beauty of the common grounds of Ford's Colony into the future. The areas included are all common properties within the grounds of the Colony; areas excluded are greenways behind and between lots and conservation areas. Specifically, landscaping at entrances and gatehouses, major intersections, sloped or expansive roadway areas, walkways, ponds, and community recreation areas will be addressed.

The Beautification Sub-Committee created a Vision Statement that describes the ultimate overall appearance of the Colony and provides guidance as projects are identified over time. The Sub-Committee, in cooperation with RCS, has selected appropriate areas in need of beautification and decided on the landscape design and plants.

The Sub-Committee has also developed (a) a strategic assessment process to assess areas for change to insure they are in line with the Vision Statement and to identify critical maintenance areas, (b) Guiding Principles that outline the committee evaluation process to assure excellent stewardship of the funding dollars appropriated by homeowners, and (c) Landscaping Guidelines for areas to be landscaped.

The Sub-Committee intends to develop a 5-year Master Landscape Plan by July 2008 to meet the vision. Each July, the 5-year plan will be updated as required, and an Annual Beautification Plan will be presented for approval.

The Roads & Project Maintenance Committee has approved one homeowner financed neighborhood sign project (Heritage Pointe) and expects to recommend a policy related to neighborhood signs to the FCHOABOD shortly.

**Objective 2: Develop a Disaster Preparedness and Recovery Plan for the community and individual residents to protect life and property.**

Disaster Recovery and Avian Flu materials were distributed in the fall of 07 and an ad hoc subcommittee participated in a regional meeting on the topic. Ford's Colony Community Emergency Response Team (FC-CERT) has 50 CERT volunteers trained by JCC. The activities of FC-CERT are published monthly in "Talk of the Colony" and they maintain a website at [www.members.cox.net/fccert](http://www.members.cox.net/fccert).

**Objective 3: Determine need for and opportunities to acquire and control additional community facilities for recreation, activities, storage and maintenance.**

Resident Bill Geib conducted a study of the Ford's Colony Swim & Tennis Club and made a presentation to the Facilities Committee in October 07. In the report, he states that the present condition of the building and facilities does not reflect well on our community - meeting rooms are "undersized and inadequate," the overall impression is "1990s dated and old," the condition of the building is "shabby, worn, dirty," furnishings are "cheap and worn out" and functionality is "obsolete." He takes a look forward and suggests (a) parking space is insufficient for the growing size of the community, (b) more small rooms will be needed for clubs, recreation, meetings and gatherings, (c) a larger room will be needed for large clubs, meetings and camps, and (d) a community social gathering place - a lounge, card or game playing, casual meeting, reading, conversation area - is needed.

He recommends:

- Establishing a community standard;
- Defining a remodel plan to maintain standard on a long-term basis;
- Revising the Capital Reserve model to accommodate the plan;
- Devising a financial plan for long range view; and
- Remodeling on a defined schedule: every 10-12 years, refresh every 3-5 years.

A study of usage of the Ford's Colony's Swim & Tennis Club was provided to the FCHOABOD by the Activities Committee in December 07. The report states that the Swim & Tennis clubhouse building is used on a regular basis by 39 clubs, interest groups, service organizations, HOA Board and standing committees. In addition, RCS has various meetings and residents rent these facilities for weddings and parties. During 2007 there were over 1,100 meetings/ functions using the clubhouse for a total of nearly 4,000 hours. Usage data indicates there is adequate capacity and availability for most activities for the near to medium term. Other facilities including tennis courts and swimming pools are considered adequate. However, the largest room has a fire code capacity of only 250 and there is a periodic need for a much larger facility to accommodate the largest meetings

such as Town Hall meetings. Most of the larger clubs - Friends & Neighbors, Travel Club, Newcomers, and Theatre Club – do not have as many meeting attendees as they have members. Parking is also a problem for these larger functions. When Ford’s Colony is fully built there will be another 1,000 homes, which could result in a 50% increase in current population of over 4,000. The report included an analysis of the following potential solutions: Split clubs into smaller groups; move large meetings off site; expand existing Swim & Tennis clubhouse; Developer builds a new, properly sized facility in a new area; or build a new facility on land donated by the Developer. The report concluded that discussions should be held with the Developer.

It should be noted that the Facilities Committee also provided a report, much of which contradicts what appeared in the Activities Committee report.

Facility needs are being discussed in conversations between the FCHOABOD and the Developer, and as a result, the Developer has agreed to convert the proposed open-air facility in Westport to an enclosed space that will accommodate groups up to 100.

### **Related Customer Satisfaction Survey Results**

Statements in the recently completed Customer Satisfaction Survey related to this goal received the following **importance** and **satisfaction** ratings (on a 5-point scale):

- “Landscaping of grounds and common areas is attractive and adequate.” (4.34 vs. 3.93)
- “HOA disaster preparedness is adequate.” (3.96 importance vs. 3.99 satisfaction)
- “Meeting facilities are adequate for future growth.” (3.94 vs. 3.09)
- “The relationship between Ford’s Colony and the greater Williamsburg community is a positive one.” (3.88 vs. 3.61)
- “Meeting facilities satisfy the current needs of the community.” (3.83 vs. 3.53)
- “The presence of the Ford’s Colony Country Club enhances property values.” (3.76 vs. 3.79)

### **Planning Assumptions**

- Facilities and landscaping of common areas will continue to be important in contributing to both quality of life and property values.
- Although the Ford’s Colony Country Club is independent of the FCHOA, the FCCC will continue to have a significant impact on property values in terms of attracting potential buyers of homes and in the landscaping and beauty of the community. Therefore, success of the Club will be important to all residents whether or not they are members of the Club.
- Interest to preserve and enhance the natural environment of Ford’s Colony will continue, and homeowners as well as local government will increasingly be interested in the use of environmentally sound practices in building and landscaping.
- FC-CERT will continue to publicize information and encourage participation in CERT.

## Issues to Consider

- **Aging Plant and Facilities.** How should FCHOA address the challenge of an aging physical plant and the concerns that current facilities will be inadequate to meet the needs of the growing community?
- **Up-To-Date Environmental (Green) Standards.** Although the FCHOA does not have control over ECC standards, should the Association address evolving homeowner interests with the Developer/ECC? Should environmental standards be reviewed/revised to ensure they address green design and architecture in line with an appropriate focus on conservation and the natural environment? E.g., energy efficiency in new homes and remodeling (metal roofs, skylights, efficient windows and heating and cooling systems, solar panels), native landscaping, storm water runoff, rain barrels, etc.
- **Relationship with the Greater Williamsburg Community.** Based on the results of the Customer Satisfaction Survey, the relationship between Ford's Colony and the greater Williamsburg community is not as positive as would be desirable. Is there an opportunity to enhance the relationship or image of Ford's Colony in the greater Williamsburg area? Is this an important issue to address in order to maintain/enhance property values? Or to increase the likelihood of community support on issues of concern to residents?
- **Understanding Importance of FCCC to Property Values.** Responses in the Customer Satisfaction Survey to the statement "The presence of the Ford's Colony Country Club enhances property values" are varied. The percentage of respondents (16%) who said this statement was only "Somewhat Important" or "Not Important" was higher than the percentage to any other statement in the survey. On the other hand, 62% of respondents indicated "Essential" or "Very Important." Should the Association seek to increase understanding among **all** residents of the relationship between FCCC success and property values?

## QUALITY OF LIFE

**CURRENT GOAL: Provide facilities and programs that will enable the FCHOA to fulfill its vision of being an outstanding residential community.**

### Overview of Current Status of Objectives

**Objective 1: Review the current and future adequacy of existing FCHOA recreational and activity facilities.**

See related objective under Property Value goal.

**Objective 2: Determine the residents' demand for Aging in Place Services.**

No activity to date.

**Objective 3: Determine the FCHOA demand for, and feasibility of mixed-use development at Longhill Road and Ford's Colony Drive.**

No activity to date.

## Related Customer Satisfaction Survey Results

Results of the recently completed Customer Satisfaction Survey indicate residents are generally very happy with the quality of life in Ford's Colony. Specific statements related to this goal received the following **importance** vs. **satisfaction** ratings (on a 5-point scale):

- "Ford's Colony provides a safe and secure environment." (4.60 vs. 4.31)
- "The roads in Ford's Colony are well maintained." (4.45 vs. 4.30)
- "Grounds and common areas are well maintained." (4.41 vs. 4.07)
- "Architectural standards are consistently applied on new construction and renovation." (4.26 vs. 3.26)
- "Outdoor facilities at the Swim and Tennis Club are well operated and maintained." (4.05 vs. 4.05)
- "Meeting facilities are adequate for future growth." (3.94 vs. 3.09)
- "Meeting facilities satisfy the current needs of the community." (3.83 vs. 3.53)
- "Recreation facilities at Westbury Park are well operated and maintained." (3.82 vs. 3.54)
- "The variety of social organizations enhances quality of life." (3.81 **importance** vs. 4.35 **satisfaction**)

## Planning Assumptions

- Each individual or family will define what is important to them to have "quality of life." And to a significant extent, quality of life is probably related as much to the greater Williamsburg community (even the weather) as it is to Ford's Colony itself.
- The Developer's plans for a Continuing Care Retirement Community (CCRC) will have an impact on Quality of Life for residents in both positive and negative ways, including but not limited to (i) opportunities for residents to remain nearby and perhaps even remain part of the social network of Ford's Colony as they move to facilities offering higher levels of care; and (ii) increased traffic on News Road.
- Research shows that many two-income families would rather write a check (i.e. pay for program staffing) than rely on programs that are volunteer-based.

## Issues to Consider

- **Facilities Plan.** Should a facilities plan, including both short-term and longer-range components, be developed to provide interested groups within Ford's Colony with possible alternatives and contacts outside of Ford's Colony for meeting facilities, depending on the size and nature of the space needed/desired?
- **Services for Older Residents.** As the demographics of the community become older, more residents will want to stay in their homes and in Ford's Colony longer. What services will be needed/desired to accommodate their interests? For example, would it make sense for the HOA to contract with a specific provider for lower-cost home health care services for residents? The community could consider partnering with agencies providing such services: for example by negotiating lower rates in exchange for office space within the community.

- **Family-Oriented Programs.** What do younger families want in the community to enhance quality of life? Do we know? What types of programs would be beneficial to families (e.g. more youth activities, adopted grandparent program, etc.)?

## **COST EFFECTIVENESS / REVENUE ENHANCEMENT**

**CURRENT GOAL:** Provide services consistent with our vision as an outstanding residential community, in a cost effective manner, and generate sufficient revenues to do so.

### **Overview of Current Status of Objectives**

**Objective 1: Improve current FCHOA and Managing Agent record keeping by providing meaningful, accurate and timely information on resource allocation to specific cost centers.**

The Finance Committee and RCS are working on a user friendly format for a Quarterly Resource Allocation Report. The Security Department is using data and has set up a format to track hours by activity. Work on this objective has not yet been completed.

**Objective 2: Develop reliable information on resident utilization of facilities and services.**

See comments under Property Values goal, Objective 3.

**Objective 3: Investigate opportunities to obtain reduced cost of services and products to residents through bulk/group purchasing power.**

No activity to date. Action to be taken in '08.

**Objective 4: Develop a detailed report on the scope of services currently performed by the Management Agent, as a basis for potential RFPs.**

Significant work has been done related to the development of a Request for Proposal (RFP) in connection with the contract to be awarded for the management of this community commencing January 1, 2010. Specifically:

- On September 26, under the joint auspices of the Fords Colony Home Owner's Association Board of Directors and its Strategic Planning Committee (SPC), a Round Table discussion was held concerning the future structure for the management of Ford's Colony.
- Other large associations and property managers of associations have been contacted to determine their management structure, its effectiveness, transitions they may have gone through, and any recommendations they would have for FCHOA.
- Meetings of the FCHOA Board and the Developer have been held to address a variety of topics, including but not limited to meeting and all other facilities, protections of FCHOA regarding new developments, possible future relationships with RCS, and a new PM agreement.

Work is currently underway to finalize the procurement approach, develop a qualified bidders list, complete Statements of Work (SOWS), and prepare the RFP for approval by the FCHOABOD. The planned timeline:

- August 2008 - issue RFP to qualified bidders
- January 2009 - FCHOABOD approval of bidder
- July 2009 - FCHOABOD approval of new PM agreement
- August 2009 - communication of new PM agreement to residents
- January 2010 - new PM agreement in effect

**Objective 5: Explore opportunities to develop additional revenues to enable the FCHOA to achieve its vision.**

The Strategic Plan calls for the development of a “Revenue Enhancement Plan.” The Finance Committee held a kick-off meeting in July ’07 and no additional action has been taken at this point.

In Spring ’07, residents voted on an amendment to the bylaws calling for a capitalization fee. While the vote resulted in approval of the fee, there was a lot of confusion about and misunderstanding of the proposed amendment and in particular, which sales would be included/excluded as related to the Developer. As a result of the confusion and concerns raised by residents, the FCHOABOD decided the bylaws would not be amended to include a capitalization fee at this time.

**Objective 6: Improve efficiencies and reduce FCHOA costs associated with disaster clean-up.**

A draft agreement between FCHOA and JCC regarding disaster clean-up is under review for signature. The Finance Committee held meetings with insurance brokers and as a result, the FCHOABOD approved an increase in the level of coverage for damage to the common areas.

The 2006 Strategic Plan includes an Action Plan to “enter into contracts with vendors necessary for disaster recovery...” Currently, the HOA does not have any standing contracts, the contractor who has been on standby in previous events is no longer capable of the type of work that might be required, and contractors or vendors must be paid if they are to be kept on standby. Management recommends a better approach is to contact potential contractors right before an anticipated event and not spend HOA dollars unnecessarily.

**Related Customer Satisfaction Survey Results**

The only statement in the recently completed Customer Satisfaction Survey related to Cost Effectiveness received the following **importance** vs. **satisfaction** rating of 3.95 (on a 5-point scale):

- “Homeowner dues provide good value for the money.” (4.44 **importance** vs. 3.95 **satisfaction**)

## **Planning Assumptions**

- A decision on the future management structure of Ford's Colony will need to be made soon as a framework for the submittal of RFPs from qualified bidders.
- The work on obtaining bids and awarding a contract for the management of this community commencing January 1, 2010 will continue.

## **Issues to Consider**

- **Future Service Levels Desired.** What level of services will residents be willing to support in the future? For example, the security budget is nearly a million dollar budget item and some residents are starting to wonder about the cost-benefit. The resource allocation data being compiled as part of the RFP process will be helpful to determine costs of specific services.
- **Revenue Enhancement Opportunities.** Is there a need to identify revenue enhancement opportunities? For example, capitalization fees could be considered again, with increased clarity and communication on the rationale and details of the plan.

## **COMMUNICATIONS**

**CURRENT GOAL: Improve and enhance communication to and from FCHOA members regarding the FCHOA, local government entities and the community at large.**

### **Overview of Current Status of Objectives**

**Objective 1: Enhance members' knowledge of the legal relationship and responsibilities of the Developer, the ECC, the Managing Agent, Ford's Colony Country Club, the FCHOA and the FCHOA Board of Directors and its Committees.**

The FCHOA Homeowner Orientation Seminar and Handbook was completed by a committee chaired by Nancy Hickok and will be available to homeowners this spring.

The monthly community newsletter, "Talk of the Colony" (TOC), is a primary communication vehicle to keep owners/residents informed. The Communications Committee includes articles in TOC related to Meet the Candidates, a Developer column, a series of articles highlighting the role and activities of each standing committee, and issue-related articles such as the pros and cons of the capitalization fee prior to the member vote. TOC reporters attend Ford's Colony events such as Homeowner's Forums, FCHOABOD meetings and Town Hall meetings. The Communications Committee will continue to explore ways in which they can provide relevant information to members.

The Customer Satisfaction Survey was completed in 2007 and the results have been shared with the FCHOABOD. An overview of the survey results was included in the March 2008 Talk of the Colony.

**Objective 2: Facilitate resident awareness of local (county and state) government issues that may affect the community. Where the community interest is clear, encourage resident participation in a FCHOA sponsored approach to local government.**

The monitoring of local activities is an ongoing function of the Strategic Planning Committee via liaisons to James City County Board of Supervisors and Planning Commission, Old Towne Road/Friends of Powhatan Creek Watershed, and VDOT. Interested residents are actively involved with the James City County Citizen's Coalition (J4C) and JCC activities related to the Developer's plans for annexation and new development, and communicate with a large number of residents as well as the FCHOABOD via blast emails.

**Objective 3: Publicize the ways in which Ford's Colony residents enhance the Williamsburg area through volunteer and similar contributions.**

A draft questionnaire has been prepared to solicit information from residents on their community activities and contributions. A publicity subcommittee has been formed and further discussions are planned with the Communications Committee to explore this objective.

**Objective 4: Develop alternatives for prompt communications to residents on urgent subjects, utilizing technologies such as "blast" messages.**

The Communications Committee is scheduled to report on available technologies to facilitate instant mass communication within Ford's Colony by 2<sup>nd</sup> Q 08.

**Related Customer Satisfaction Survey Results**

Statements in the recently completed Customer Satisfaction Survey related to this goal received the following **importance** vs. **satisfaction** ratings (on a 5-point scale):

- "Homeowners concerns and complaints receive an effective response." (4.38 vs. 3.52)
- "Realtec's development plans are communicated to the homeowners." (4.37 vs. 3.13)
- "Homeowners receive adequate and timely information from the Board and Standing Committees." (4.15 vs. 3.81)
- "The 'Talk of the Colony' newsletter provides useful and timely information." (4.13 **importance** vs. 4.31 **satisfaction**)
- "Broadcast emails are an effective means of communication within Ford's Colony." (4.00 vs. 4.10)
- "Frequency and content of Town Hall meetings are adequate." (3.74 vs. 3.92)
- "The FCHOA web site ([www.fchoa.org](http://www.fchoa.org)) is useful." (3.68 vs. 3.76)

**Planning Assumptions**

- As the Ford's Colony community continues to grow, effective communication will be important to avoid misunderstandings and to retain a sense of community.

- Communication technologies will increasingly support better ways to provide residents and homeowners with **access** to information on a ‘need to know’ or ‘want to know’ basis.

### **Issues to Consider**

- **Tracking Customer/Resident Satisfaction.** How should the FCHOA track customer/resident satisfaction on an ongoing basis? What mechanisms, in addition to the Customer Satisfaction Survey, should be used? How often should a Customer Satisfaction Survey be conducted?
- **Effective Communication and Building Trust between FCHOABOD and Residents.** Are there ways in which communication among the FCHOABOD, committees and residents can be enhanced? How can trust be enhanced? Based on the results of the Customer Satisfaction Survey, effective and timely communication with residents continues to be a challenge. In the past two years, there have been at least three issues where communication with residents has been a challenge, specifically: (1) facilities - lack of understanding of decisions of past FCHOA boards and Advisory Committees; (2) the capitalization fee issue; and (3) developer plans.

## **TECHNOLOGY**

**CURRENT GOAL: Enhance the quality of all FCHOA activities through the effective use of technology.**

### **Overview of Current Status of Objectives**

**Objective 1: Explore all opportunities to employ technology to improve the quality of life and operations in Ford’s Colony.**

An in-depth study of ways to take advantage of new technologies in all aspects of community operations and make appropriate recommendations will be conducted in 08.

Several efforts to utilize IT capabilities by Ford’s Colony are already in place. The most recent example is the just-completed balloting for HOA board members which took place almost exclusively through the internet. About 43% of eligible voting units participated, just a few percentage points less than the year previously using paper ballots. The changed process was considerably less expensive in dollars spent and in volunteer hours required than the previous year. Additionally, it appears to demonstrate Ford’s Colony residents’ “readiness” for the technology of the 21<sup>st</sup> century.

“Blast” emails, operated through Community Services, continue to be utilized to communicate information of broad interest from the HOA board, standing committees and other community organizations. It is estimated that upwards of 70% of property owners have made their email addresses available for this purpose. Also in place, on a “stand by” basis, is a system that may be used to make telephone contact with every Ford’s Colony household if warranted by some emergency condition. It is possible that this system could be used in the future to communicate matters of a non-emergency nature.

A Ford's Colony team is looking at the feasibility of broadcasting and/or making available archival copies of FCHOA board meetings or other community events of broad interest. This will enable us to virtually "expand the room size" of our brick and mortar facilities for certain purposes (but probably not for wine and cheese events).

**Objective 2: Use technology to unify multiple data bases to provide accurate, meaningful and timely data.**

The current strategic plan notes that "statistical data on Ford's Colony residents, Ford's Colony property owners, and users of the FCHOA security services (including access gate services) are currently maintained in separate but often overlapping databases, which are unable to share data and are updated at different times. Unifying these data bases would permit rapid access to information relevant to evaluating services and service users." An analysis of useable data has been completed and development of one database is underway.

**Objective 3: Develop complete and current demographic data on Ford's Colony households to facilitate decision making by the FCHOA Board and its Committees.**

The Strategic Planning Committee developed a Census Plan that was approved by the FCHOABOD in June 07. The census data will be collected by Security in conjunction with the gate card renewal process.

**Objective 4: Provide reliable and cost effective access to new communications technologies, including improved cellular, broadband, cable and wireless technology that allow high speed access to the network or internet ("Wi-Fi") to FCHOA residents.**

Blast email program and robo-phone systems are in place. The development of a comprehensive FCHOA Technologies Access Plan is scheduled for 09.

**Related Customer Satisfaction Survey Results**

Statements in the recently completed Customer Satisfaction related to Communication Technologies received the following **importance** vs. **satisfaction** ratings (on a 5-point scale):

- "Broadcast emails are an effective means of communication within Ford's Colony." (4.00 **importance** vs. 4.10 **satisfaction**)
- "The FCHOA web site ([www.fchoa.org](http://www.fchoa.org)) is useful." (3.68 vs. 3.76)

Statements in the recently completed Customer Satisfaction Survey related to Security received the following **importance** vs. **satisfaction** ratings (on a 5-point scale):

- "The gate card access system for homeowners and their guests is adequate." (4.46 vs.4.07)
- "Daytime access through my usual gate is easy." (4.45 **importance** vs. 4.38 **satisfaction**)

- “Ford’s Colony Security controls access by non-residents.” (4.41 vs. 3.81)
- “Ford’s Colony Security and JCC police are effective in enforcing traffic rules.” (3.95 vs. 3.78)
- “The gate card access system for contractors is adequate.” (3.87 vs. 3.62)

### **Planning Assumptions**

- Electronic communication will increasingly be used to enhance two-way communication between FCHOA leadership and homeowners/residents, including but not limited to online elections, surveys, email blasts, and discussion boards.
- In the foreseeable future, the Association will need to offer residents who are not comfortable with electronic communication other options to participate, including hard copy.

### **Issues to Consider**

- **Social Networking.** Are there ways in which the FCHOA can utilize interactive websites to enhance the sharing of information and building trust and relationships? What opportunities and challenges are presented by interactive websites? For example, issues to be addressed by the FCHOABOD could be posted for community input and discussion prior to FCHOABOD dialogue and deliberation. Or a blog could be set up where residents could rate builders, remodelers, contractors, locations for wine-and-dines, etc.
- **Moving to the 21st Century.** What steps can be taken to help residents become more comfortable with opportunities to participate in the emerging electronic life of the community?
- **Use of Technology.** Using our new online voting capacity, is it possible to poll the residents on key issues? Must we develop plans to make the residents more aware of this capability, how to use it effectively and its possible impact on future issues before the FCHOABOD?

# Principal Sources

## ECONOMIC ISSUES

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- Old Dominion University; Economic Forecasting Project; 2008 Economic Forecast for Hampton Roads; January, 2008
- Virginia Employment Commission; County Profile: James City County
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- David Jolley; Regional President, First Market Bank
- Rolf Kramer; Long & Foster Realty
- Susan Kranzer; Liz Moore Realty
- Holly Miller; First Choice Realty
- Kimber Smith; Prudential McCardle Realty
- Stephen T. Yavorsky; Assistant Director, James City County Office of Economic Development

## GOVERNMENTAL ISSUES

- James City County Land use Map
- James City County Comprehensive Plan
- Supervisor Jim Icenhour
- Terry Elkins
- David Jarman, Constraint on Growth in James City County
- Debbie Kratter
- John H. Haldeman, Individual Rights vs. The Common Good
- David H. Feldman, The Fiscal Consequences of Residential Development
- John H. Haldeman, Letter to the Board of Supervisors dated February 25, 2008
- Memorandum from Leo P. Rogers to The Board of Supervisors dated January 22, 2008 re: 24-283 and 24-275
- Appeal to the Board of Zoning Appeals on behalf of FCHOA
- Williamsburg-James City County Public Schools FY 2008-2009 Budget Executive Summary (*Note: Figures do not reflect changes made per Governor's revised (2/08) revenue estimates.*)
- Chesapeake Bay ordinance
- Chesapeake Bay Local Assistance Department web site.

## TECHNOLOGY

- Virginia Energy Plan, 2007
- U. S. Green Building Council; [www.usgbc.org](http://www.usgbc.org)
- Earthcraft Home Virginia; [www.ecvirginia.org](http://www.ecvirginia.org)
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- Terry Elkins
- Ivan Gavrilovic

- David Murray; Project Director, Peninsula Association for Aging
- Tom Tingle; Partner, Guernsey, Tingle Architects

## **SOCIAL, DEMOGRAPHIC AND CONSUMER VALUES**

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- “More Americans Are Giving Up Golf” The New York Times, nytimes.com, February 21, 2008
- Drew Mulhare
- Bill O’Donovan

## **DEVELOPER PLANS**

- Dave Jarman
- Debbie Kratter
- Drew Mulhare

## **FORD’S COLONY COUNTRY CLUB**

- Gary Krull
- Larry Spielberg

## **SECTION II: REVIEW OF PROGRESS: 2006 STRATEGIC PLAN**

- SPC Committee Liaisons with Advisory Committees
- Steve Hein
- Debbie Kratter
- Drew Mulhare

2008 Situation Assessment – Authored by: Al Ashley, Tony Annoni & Kermit Eide  
(members of the Strategic Planning Committee)