



2022-2025

Manassas

Regional Airport

Strategic Plan



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Manassas Airport Commission

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MISSION

The **Mission** of the Manassas Regional Airport is to provide world class facilities and services to our customers and be a major driver of economic growth to our community.

VISION

The **Vision** of the Manassas Regional Airport is to be a world class, innovative, thriving aviation gateway for the greater Washington, DC area, providing global access and economic opportunity for our customers and our community.

VALUES

Customer Service

Honesty

Respect

Integrity

Stewardship

Teamwork



STRATEGIC PRIORITIES

Operational Expansion & Improvement:

The Airport will create an exceptional, world-class experience for our current and future aviation customers.

Business Growth &

Economic Development:

The Airport will position itself for business growth and development through sound master planning, aggressive marketing efforts and strategic partnerships.

Sustainability &

Organizational Excellence:

The Airport will operate in such a manner as to optimize revenue generation for continued growth while managing operating costs so as to create a strong bottom line and financial stability.

Innovation & Emerging

Technology:

The Airport will take a leadership role in preparing for and supporting new Advanced Air Mobility (AAM) technology in the region.

Community Education &

Partnerships:

The Airport will contribute to the community's learning environment by providing innovative and engaging opportunities about the aviation industry, including education and careers.



INTRODUCTION

The Manassas Regional Airport provides a critical connection in the operation of the region's transportation system and has significant multiplier effects on both local and regional economies. To meet their social, economic, operational and environmental obligations in the face of rapidly changing conditions, the Airport Commission and staff updates their strategic plan every 3 to 5 years. Strategic planning is generally defined as the process undertaken by an organization to define its future and formulate a road map to guide the organization from its current state to its vision for the future. More specifically, *"strategic planning for airports consists of more than just ensuring the safety and security of the traveling public and achieving a strong financial performance.....strategic planning for airports projects a future vision for the airport organization, determines strategies and objectives for the growth or prosperity of the organization (including the type of products and services it should provide), and defines how the vision and objectives can be accomplished."* (Transportation Research Board, 2009)

The process of strategic planning has many benefits including facilitating decision making and bringing order to the organization and to focus on priorities. In addition, updating the Airport's Strategic Plan at this time provides an opportunity to align the airports' strategic operations plan with the Manassas City Council's 2025 Strategic Plan and shape the development analysis and conclusions of the upcoming masterplan update. The masterplan is a document that will guide the physical development of the Airport for the next 20 years.



The Airport is owned by the City of Manassas, Virginia and the Airport Commission is appointed by City Council with representation from Prince William County. Alignment of the Airport's strategic plan with the Council's strategic plan is critical to aligning the resources from both the City and the Airport towards a shared community vision.



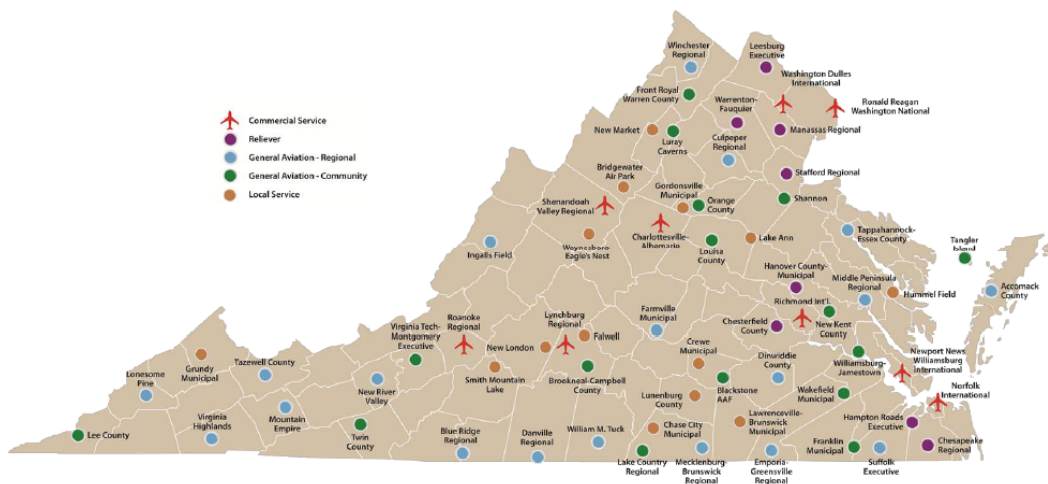
BRIEF HISTORY

Manassas (HEF) is a General Aviation Airport and part of the FAA's National Plan of Integrated Airport Systems (NPIAS). GA Airports are public-use airports that do not have scheduled service or have less than 2,500 annual passenger boardings.

Owned by the City of Manassas, the airport started operations in 1963 at its' current location with a single 3,700' x 100' paved runway, a rotating beacon, parking facilities, a maintenance hangar, office and a full-time, dedicated airport manager. Airport expansion continued through the next several decades while the Town of Manassas grew into the City of Manassas, achieving independent City status in 1975.

In 1992, the city made the strategic decision to purchase an air traffic control tower from Centennial, CO and reassembled it at the airport further enhancing the operation of the airport. Continued improvements in lighting, aircraft parking, and hangars facilitated airport operations, while new roads, entrances, and a main terminal building constructed in 1996, made the airport more accessible to the public. In 1997, a second, parallel runway and taxiway was constructed and the east runway was extended to 5,700 feet, enabling larger aircraft to land more efficiently and safely.

In 2012 the east runway was further extended to a new length of 6,200 feet. At that same time, Manassas was notably categorized as one of only 84 National General Aviation airports by the FAA. An important consideration for the planning process is that Manassas is also designated as a reliever airport for Washington Dulles International Airport (IAD) and Ronald Regan Washington National Airport (DCA) and, as part of the NPIAS, Manassas is eligible to receive federal grants under the Airport Improvement Program (AIP).



PRESENT SITUATION

Today, 889 acres are dedicated to airport use. The airport has over 400 based aircraft, 156 t-hangars and 141 tie-downs. Annual operations are defined by the number of takeoffs and landings with the Manassas Regional Airport averaging 255 per day, and a total of over 97,000 annually. In comparison Leesburg Executive Airport averages over 100,000 annual operations while Stafford Regional Airport much less at 29,000 annual operations.

The Airport is one of six (6) enterprise funds for the City of Manassas. The City's enterprise funds are financed and operated in a manner similar to private business enterprises where the intent of the governing authority is that the cost of operating the service is recovered primarily through user charges. The FY22 Operating Budget for the Airport is \$4,970,100 including grant expenditures. The Airport's revenue is fairly stable and reliable from charges for services including fuel flowage fees. In FY21 these revenues were \$3,420,116. The airport in FY22 has 8 employees.

Importantly, the airport returns over \$375 million annually to the local economy which is over 1/3rd of the total economic impact from the top eight GA airports in the Commonwealth of Virginia.

The airport hosts two major community events including the LeaseWeb Manassas Airshow and the Manassas Runway 10k/5k/1Miler which attract large crowds to the airport.

TOTAL ANNUAL ECONOMIC IMPACTS OF TOP EIGHT VIRGINIA'S GA AIRPORT

Manassas	- \$375,492,000
Bridgewater	- \$144,115,000
Leesburg	- \$121,482,000
Hampton Roads	- \$60,543,000
Richmond-Chesterfield	- \$52,450,000
Blackstone	- \$27,125,000
Stafford	- \$23,310,000
Dinwiddie County Airport	- \$17,893,000

Source: 2017 Virginia Airport System Economic Impact Study, Va Dept of Aviation.



INDUSTRY TRENDS AND EMERGING TECHNOLOGIES

General aviation comprises all civil flights except scheduled passenger airline services. Based on the aircraft type, the market is typically segmented into helicopters, piston fixed-wing aircraft, turboprop aircraft, and business jets.

The COVID-19 pandemic has affected the general aviation market in the short term, with a decline in the number of orders and deliveries of new aircraft in 2020. However, due to the increased operations of the helicopters and business jets for the transport of patients, charter operations, and VIP transportation among others, the plans for fleet modernization appear to have been unaffected in the long term. The active general aviation fleet, which showed an overall decline of 2.8% between 2019 and 2020, is projected to slightly increase from its current level due primarily to increases in the turbine, experimental, and light sport fleets. The fixed-wing piston fleet is predicted to continue to shrink over the next several years.

Unfavorable pilot demographics, overall increasing cost of aircraft ownership, availability of much lower cost alternatives for recreational usage, coupled with new aircraft deliveries not keeping pace with retirements of the aging fleet are the drivers of the decline of fixed-wing piston aircraft. While the growth in the turbine fleet is being fueled by the growth in the GDP and corporate profits as well as the increasing number of high-wealth individuals domestically and globally.

Industry Trend to Watch...the number and use of fixed-wing piston aircraft are declining while the number and use of jet aircraft is increasing

Growth in the general aviation industry is measured not only by the number of aircraft ordered but also by the number of hours flown. And although the total active general aviation fleet is projected to marginally decline, the number of general aviation hours flown is forecast to increase as the newer aircraft fly more hours each year. Fixed wing piston hours are forecast to decrease slightly (less than 1%) while hours flown by turbine aircraft (including rotorcraft) are forecast to increase 2.2% yearly between 2019 and 2041. Jet aircraft are expected to account for most of that increase. Rotorcraft hours are projected to grow slightly as well but the most growth is projected in the light sport aircraft category primarily driven by growth in that fleet.

The growing concern over aviation emissions has shifted the focus of most manufacturers toward the development of all-electric aircraft. New electric aircraft models are being developed and investments of the aerospace companies towards the introduction of urban air mobility within the next 5 to 10 years are increasing. This development is expected to rapidly strengthen the growth of the general aviation market in the region.

Two types of aircrafts are being developed, vertical takeoff and landing vehicles (eVTOLs) that don't necessarily need an airport and electric short takeoff and landing (eSTOLs) that are airport based but require a much shorter runway than traditional jet fueled aircraft.

The NBAA, in May of last year, claimed that more than 250 manufacturers are currently developing hybrid-electric and all-electric vertical takeoff and landing (eVTOL) AAM vehicles with a low noise and emissions footprint. Other countries are working to develop AAM systems and infrastructure, reinforcing the need for the U.S. to remain a leader in the segment with Manassas Regional Airport well positioned to be a leader in accommodating such aircraft.

Sources:

https://www.faa.gov/data_research/aviation/aerospace_forecasts/media/FAA_Aerospace_Forecasts_FY_2021-2041.pdf accessed 11/5/2021

<https://www.mordorintelligence.com/industry-reports/general-aviation-market> accessed 11/5/2021

<https://nbaa.org/aircraft-operations/emerging-technologies/advanced-air-mobility-aam/nbaa-part-of-call-for-inclusion-of-aam-development-grants-in-infrastructure-legislation> accessed 11/5/2021

<https://evtol.news/aurora> - accessed 1/3/2022

On Jan. 22, 2019, a full-size prototype of an all-electric Vertical Take-Off and Landing (eVTOL) aircraft with eight propellers for vertical flight designed and built by Manassas based Aurora Flight Sciences, a Boeing Company, was successfully hovered at the Manassas Regional Airport.



Pegasus Passenger Air Vehicle (PAV)
Aurora Flight Sciences, a Boeing Company
Manassas, Virginia, USA
www.aurora.aero

OPPORTUNITIES, CONSTRAINTS and CRITICAL ISSUES

The Airport Commission worked with the Airport team to review the Airport's opportunities and constraints and to identify the critical issues that would need to be addressed during this planning period. In addition, key public officials were asked to provide additional input and a survey was sent to stakeholders of the airport for their thoughts. This information was used to develop the following list of opportunities, constraints and critical issues.

Opportunities are those factors that provide possibilities for the airport to expand so as to increase its revenues and enhance its facilities.

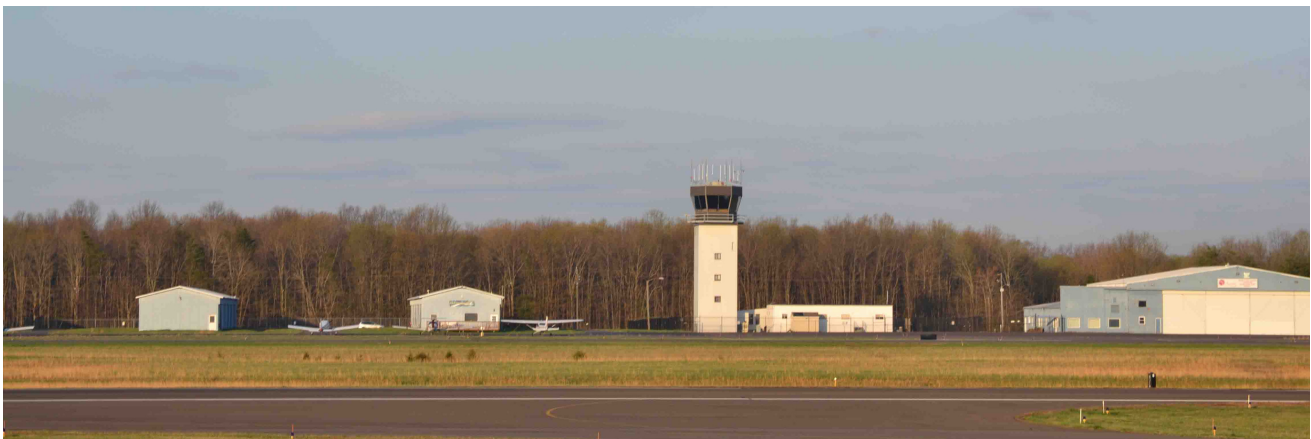
- Growth in business and private jet travel fueled by continued growth in corporate profits and the increase in the number of high wealth individuals. Potential to enhance private jet travel by reserving the East Complex for corporate and air service ops.
- Increased interest from scheduled charter services.
- Introduction of electric Regional Air Mobility (RAM) aircraft to support “intra-regional” missions up to 500 miles. These aircraft will primarily utilize existing, smaller airports to carry up to 19 passengers or equivalent cargo. Ability to support the design, construction and operation of a vertiport either on or off-airport.
- Growth in the tourism sector - many charter operators and tourism companies are making plans to expand their fleet with introduction of new piston engine aircraft, turboprop aircraft, and helicopters.
- Passage of the Infrastructure Investment and Jobs Act which will not only provide funding that will impact airports but also passenger rail, public transit, safety and research, electric vehicle charging and other elements that will positively impact regional airports as hubs in multi-modal transportation systems.
- New development, including hotels, at the Landings at Cannon Branch and Innovation Park as well as continued economic growth in the region.
- Emerging aeronautical technologies, and the airport’s proximity to major research and development facilities and manufacturers.
- Growth and expansion of George Mason University and other area colleges, universities and trade schools.
- Availability of adjacent land to grow ancillary development, particularly maintenance facilities and research and development facilities as well as further protect the airport from incompatible land use development.

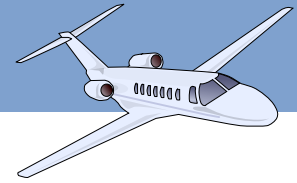
Constraints are those factors that limit the ability to grow, and therefore limit the enhancements to the operations of the airport.

- Special Flight Rules Area restrictions and Military Operations Area Encroachment which restricts traffic in and out of the airport
- Increasing environmental regulations, particularly those related to stormwater
- Number of airports in the region including direct competition from Dulles and Leesburg

Critical issues to address in this planning cycle includes those weaknesses, liabilities and/or constraints that have the ability to be addressed either through the current strategic plan or upcoming master plan.

- Outdated Air Traffic Control (ATC) Tower
- Lack of full-sized aircraft maintenance facility
- Lack of scheduled charter service
- Lack of staff resources needed to support aggressive marketing campaign, funding and lobbying efforts to support growth and expansion
- Inadequate west side services and aging west side complex; upgrades will be needed to support a possible relocation of smaller aircraft
- No LPV approach to other runways, ILS is the only option in inclement weather
- Lack of on-site Fire & Rescue services
- Provision for electric – and hydrogen-powered aircraft, especially modification to existing electrical systems and researching the design and building code issues regarding the storage of hydrogen tanks





Priority 1 - Operational Expansion & Improvement

Goal 1

Enhance onsite services needed to support existing tenants and attract additional aeronautical uses.

Goal 2

Develop a method of measuring customer satisfaction to accurately measure the success of current efforts and identify ways to enhance customer service.

Goal 3

Update the Airport's Master Plan to guide the future growth and development of the airport.

Objective 1.1 - Identify runway improvements, funding and construction schedule for the FY23-25 CIP.

Objective 1.2 - Identify and secure a funding path for a new ATC Tower.

Objective 1.3 - Identify a path forward for providing ARFF services at the airport that provides optimal coverage for aircraft traffic.

Objective 2.1 - Explore the cost and benefits of engaging a firm to conduct a triannual customer service survey that also addresses the issue of measuring transient customer satisfaction.

Objective 2.2 - Incorporate customer satisfaction surveys into the 3-year strategic planning process.

Objective 2.3 - Develop specific customer service performance goals and measurements during the next strategic planning process.

Objective 3.1 - Determine the highest and best uses for the terminal building and nearby facilities that anticipate future aircraft mixes.

Objective 3.2 - Identify the best locations and facilities for both piston and jet operations to enhance the synergy between different aircraft.

Objective 3.3 - Identify the physical infrastructure needed for additional aeronautical uses to grow the airport.

Priority 2 - Business Growth & Economic Development

Goal 1

Ensure a strong economic platform for on and off-airport development.

Goal 2

Raise the awareness of the Airport's presence in the community and in the region as an executive airport and center of innovation.

Goal 3

Capitalize on the forecast growth in corporate and private jet service to grow the Airport's revenues.

Objective 1.1 - Identify specific aircraft types (fleet mix) needed to grow the airport in the Master Plan Update.

Objective 1.2 - Work cooperatively with Manassas and PW Economic Development to identify targeted industries for both airside and landside development that balance the airport's portfolio.

Objective 1.3 - Encourage the participation of Airport businesses in City, County and Chamber events.

Objective 2.1 - Update the Airport's marketing plan in 2022 to focus on areas that positively impact the Airport's strategic priorities, particularly for business development and customer service.

Objective 2.2 - Develop an independent website for the Airport to promote business development and provide exceptional customer service to both onsite and transient customers.

Objective 2.3 - Enhance the Airport's social media and presence on partner websites to convey the message of the Airport as a regional resource and asset

Objective 3.1 - Develop the Northwest corporate pad site.

Objective 3.2 - Develop the Southeast corporate pad site.

Objective 3.3 - Identify the development potential for the remaining properties in the Southwest development area.

GOALS AND OBJECTIVES

Priority 3 - Innovation & Emerging Technology

Goal 1

Establish an Emerging Technologies Task Force to identify what emerging technology is best suited for and meets the development goals of the airport.

Goal 2

Evaluate the utility infrastructure needed to support emerging technologies.

Goal 3

Celebrate the successes of key tenants working in Advanced Air Mobility (AAM) technologies.

Objective 1.1 - Host a conference on emerging technologies through a partnership with a university and/or the Chamber to learn and explore the opportunities presented.

Objective 1.2 - Participate in necessary meetings, task forces or committees convened regionally, statewide or nationally to establish Advanced Air Mobility (AAM) policies and regulations.

Objective 1.3 - Include in the master plan update the emerging technology best suited for the airport and what is needed to implement it or support users.

Objective 2.1 - Convene a working committee made up of Airport and Utilities staff in 2022.

Objective 2.2 - Identify existing failing infrastructure and future needs to be incorporated into the CIP.

Objective 2.3 - Develop a utilities plan for the airport.

Objective 3.1 - Explore advancements in AAM and identify a path in which the Airport can participate in its growth.

Objective 3.2 - Include key tenant information regarding AAM and other aeronautical advances in the Airport's annual reports.

Objective 3.3 - Coordinate press releases and media information with key tenants, making sure that the Airport and location is included.

Priority 4 - Community Education & Partnerships

Goal 1

Develop at least one aviation industry workforce initiative aligned with the workforce needs of the airport and customers.

Goal 2

Ensure that the airport is actively engaged in the community.

Goal 3

Ensure an effective working relationship with elected officials and private business CEO's to share the airport's vision and achieve the strategic priorities.

Objective 1.1 - Establish a relationship with a college/university to identify potential partnerships such as an aerospace program and/or credentialed maintenance program.

Objective 1.2 - Establish the Airport as a resource for K-12 Career and Technical Education (CTE) programs in aircraft maintenance or other related trades.

Objective 1.3 - Determine the feasibility and suitability of an annual aviation education and industry event that engages middle school students to encourage aviation related careers.

Objective 2.1 - Proactively engage with event coordinators and the City to enhance and promote on-site events to grow the significance of the airport in the community.

Objective 2.2 - Emphasize the Airport's significant accomplishments in social media posts to highlight the importance of the aviation system and the positive impact it has on the community.

Objective 3.1 - Convene an elected officials workshop/reception to present the updated Strategic Plan and provide an update on airport activities.

Objective 3.2 - Invite key organizations, such as the Chamber of Commerce CEO/Presidents Business Roundtable to hold meetings at the Terminal Building.

Objective 3.3 - Create an Airport Commission committee charged with identifying key, strategic partnerships with organizations and individuals that further the Airport's strategic priorities.

Priority 5 - Sustainability & Organizational Excellence

Goal 1

Control and align Airport finances with Airport and City strategic goals.

Goal 2

Comply with safety, health, and security regulations through engagement and partnerships with regulatory agencies.

Goal 3

Ensure healthy employee satisfaction ratings for the overall working environment at the airport and address staff's understanding of the meaning and purpose of their responsibilities.

Objective 1.1 - Implement a workforce analysis for identifying additional staffing resources needed to keep the airport sustainable and growing.

Objective 1.2 - Identify and create new resource and revenue opportunities including exploring non-aeronautical ventures for incompatible land uses.

Objective 1.3 - Develop a succession plan for Airport leadership.

Objective 2.1 - Carve out time for Airport staff training and education on existing and proposed regulations to identify and manage impacts to the airport.

Objective 2.2 - Identify and participate in key industry work groups that will impact the airports growth and operations.

Objective 2.3 - Maintain and participate in regional industry partnerships.

Objective 3.1 - Provide training resources that prepare employees to thrive and grow professionally and adapt to changes in the workplace and industry.

Objective 3.2 - Work towards right sizing the staff team to increase the team's effectiveness and ability to address strategic priorities and support improvements identified in City's employee survey.

Objective 3.3 - Enhance internal staff communication and offer a better means of identifying employee expectations, meaning and purpose.

MEASURING SUCCESS

HOW DO WE COMPARE?

Retain #1 Ranking in Economic Impact in the Commonwealth; and Improve #2 Ranking in General Aviation Operations in the Region

HOW ARE WE GROWING?

% Growth in Fuel Sales;
% Growth in Based Aircraft;
% Growth in Operations; and
% Growth in Positive Print and Media Stories

WHAT IS OUR BOTTOM LINE?

% Growth in Earnings;
Improvement in Staff Satisfaction Ratings; and
Zero Accidents and Workman Compensation Claims

WHAT HAVE WE ACHIEVED?

Funding allocated for a new ATC tower;
completed CIP projects; completed master plan and marketing plan;
completed community and educational events



Manassas Regional Airport 2022 - 2025 Strategic Plan

