

Agency Strategic Plan

Jamestown-Yorktown Foundation (425)

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Biennium: 2008-10 ▼

Mission and Vision

Mission Statement

Jamestown-Yorktown Foundation's (JYF) mission is to educate and to promote understanding and awareness of Virginia's role in the creation of the United States of America. The Foundation, accredited by the American Association of Museums, is an educational institution of the Commonwealth of Virginia and administers two living-history museums. Jamestown Settlement interprets the cultures of 17th-century colonial Jamestown, America's first permanent English settlement, and the Powhatan Indians. The Yorktown Victory Center interprets the impact of the American Revolution on the people of America and the development of the new nation.

Vision Statement

We envision the Jamestown-Yorktown Foundation as an institution that:

- provides engaging exhibits and 17th- and 18th-century living history museum experiences for hundreds of thousands of visitors;
- provides highly effective historical educational experiences for children in each of Virginia's school districts and other school districts in the nation and the world that wish to participate;
- provides inviting and historically accurate sites that are fun and facilitate learning;
- displays, interprets and protects key artifacts of the Jamestown and American Revolution eras;
- maintains a cadre of trained, highly competent and effective interpreters, teachers, historians, curators and volunteers that ensure that visitors and students understand key concepts that have led to the creation of the United States of America;
- serves as a model workplace in terms of fairness, diversity and team spirit.
- demonstrates best practices in the museum field.

Executive Progress Report

Service Performance and Productivity**Summary of current service performance**

The Jamestown-Yorktown Foundation (JYF) operates two living-history museums: Jamestown Settlement (JS) and the Yorktown Victory Center (YVC). It serves visitors to these museums, provides structured education programs to students at both museums, and outreach instruction to schoolchildren across the Commonwealth. JYF's structured education programs have the largest participation of any museum in the state. As a result, JYF is a major provider of public education services and an important tourism destination. Visitation at the museums totaled 972,707 in FY2007. As part of a comprehensive customer research program, visitors complete comment cards during their visit, part-time research staff conduct structured surveys with randomly selected visitors, and teachers participating in structured education programs complete program evaluation forms. In FY2007, 99% of visitors and teachers surveyed rated their experiences with the museums/programs as "good" or "excellent," exceeding our performance measure goal of 95%.

JYF is heavily dependent upon admissions revenue to support its operating budget, and paid admissions totaled 880,977 during FY2007. Approximately 43% of JYF's operating budget is non-general fund, primarily generated through admission ticket sales. Research indicates that "word-of-mouth" recommendations are a significant factor in a tourist's decision to visit JYF museums. Among the top reasons indicated by visitors to attend the museums were an interest in history, their children's education, or a vacation or business trip. Research shows that JYF is meeting these expectations.

Based on an economic model developed by the University of Virginia, visitors to the JYF museums spent an estimated \$132 million in the Williamsburg area [Historic Triangle] in 2006.

During the 2006-2007 academic year, JYF provided hands-on programs to students at both museums and in outreach settings. Structured educational programs at the two museums served 263,773 participants, up 28% from the previous year. Outreach education programs were presented to 150,298 students in all 132 of Virginia's school districts. Additionally, we provided programming to 14,014 students in National Outreach. Educational programs are designed to address the Commonwealth's Standards of Learning (SOLs) for history and social studies.

The JYF artifact collection expanded by 23 artifacts to a total of 68,821 during FY2007. The collection consists of furniture, portraits, decorative items and archaeological artifacts. Recent additions include a 17th-century wheel-lock pistol and a 17th century portable hourglass for JS and commemorative shoe buckles of George Washington's inauguration and a Colonial officer's fusil for YVC.

The JYF administrative team continues to seek to maximize its service performance and has met its overall goals with

respect to the categories contained in Virginia Performs - Management Scorecard & Agency Performance Measures. However, there are specific areas in which JYF is taking steps to improve performance, specifically in minority and woman-owned business contracting and internal controls.

Finally, JYF private affiliates raised significant private funds through both charitable donations and retail operations to leverage public dollars to support museum programs and facilities. Pledges to the Campaign for Jamestown Settlement have met 97% of the total goal thus far. Profits from three museum gift shops and the JS café also supported JYF operations.

- *Summary of current productivity*

JYF operates two living-history museums and a successful outreach program, and provides support to Jamestown 2007 operations. JYF operates on a business model, examining its return on investment to measure its productivity. For example, in FY2007, the JYF obtained admissions income of \$6 for every \$1 expended on direct media advertising.

During FY2007, JYF completed the "Barometer Project," designed to analyze 2007 commemoration staffing plans to ensure museum efficiency and effectiveness at various projected visitation levels, to control costs, and to ensure the flexibility to increase or decrease staffing levels as visitation patterns change. External reviewers provided an independent analysis, which challenged staff assumptions and strengthened staffing plan preparation efforts. With respect to ensuring sufficient facilities for anticipated crowds during Anniversary Weekend, some Poisson-exponential modeling and Monte Carlo simulations were performed. The results of these simulations were compared with industry standards to ensure manageable queues, while minimizing additional costs. The bottom line is that JYF evaluates staffing and resource use levels in terms of its own experience; but challenges that experience with outside evaluations periodically to ensure the productivity levels associated with its conventional wisdom are justified in a changing external environment.

Increased use of volunteers has also increased agency productivity. The number of volunteer hours in FY2007 increased to 67,794 hours of service – a 37% increase from FY06. This spirit of volunteerism not only enhances our staff skill set, but has a conservatively estimated value to the agency of \$1,271,828.

Initiatives, Rankings and Customer Trends

- *Summary of Major Initiatives and Related Progress*

During FY2007, the capital program envisioned in the JS Master Plan was nearly completed. The gallery complex, maintenance building and riverfront amenities/ shipwright buildings are open to the public. Improvements to James Fort and the Powhatan Indian Village should be completed by 2008. Acquisition of ten acres of land for future growth is underway, as is the design of a sound wall/buffer along Jamestown Road to isolate the 17th-century interpretive areas from 21st-century visual distractions and noise.

Initial planning efforts are also underway for the renovation and expansion of YVC. Facing expanded visitation, exhibits that have lasted beyond their useful life, and space and visitor way-finding issues, the need is pressing to better accommodate ticket purchasers and continue to ensure that the public product is one people will want to buy a ticket to experience. A new film that orients the visitor and introduces major themes is also envisioned. Replacing YVC building and exhibits is a top priority for the agency to successfully accomplish its mission and provide for an overall sustained admission revenue stream.

In terms of exhibits, the new JS permanent gallery was opened in late fall 2006, as did two YVC renovated galleries. The new Jamestown film was completed and is now showing in the JS theater. The first artifact rotation of The World of 1607 special exhibit opened in April, 2007. The second rotation of loaned artifacts opened July 2007. The fourth and final rotation will end the exhibit, and it will close in April 2008. Two additional JS special exhibits are planned: "A New World: England's First View of America" (an exhibit of John White's watercolors, painted in the 16th century and on loan from the British Museum), and "Jamestown and Bermuda: Virginia Company Colonies". The first exhibit will open July – October 2008 and the second will be in the latter half of FY2009. Special exhibits are important for continuing media interest and encourage repeat visitation. Offerings in coming biennia will be critical in expanding the educational impact of JYF museums in the future.

As of spring 2007, both the new Godspeed and Discovery had been completed and were put into service. These new ships, in combination with the Susan Constant, participated in numerous commemorative events and have been opened to visitors at the museum.

In 2007, JYF completed the replacement of its ticketing/reservations system. This was a major project that was critical due to (a) the former vendor discontinuing software support (b) the increases in visitation volume created by the commemoration, (c) expansion of Internet ticketing capabilities, and (d) the need for timed ticketing in certain areas of the museums. Looking to the future, replacement of gift shop inventory software, implementation of the statewide ERP program, and acquisition of a time and attendance system are a sample of technology issues that JYF will need to

address in order to increase productivity.

In this biennium, JYF must secure reaccreditation from the American Association of Museums by engaging in the AAM self-study and on-site review programs within the established timeframe set forth by AAM in order to demonstrate that the JYF museums meet or exceed best practices in the museum field.

Additional major initiatives for the 2008-2010 Biennium include: (a) adjusting operations to maintain and accommodate visitation without commemorative specific appropriations, (b) continuing structured on-site and outreach educational programs including National Outreach subject to school district funding, (c) providing engaging special exhibits at both museums, (d) maintaining facilities that are much larger in size, (e) meeting state compliance objectives, (f) protecting NGF revenue streams, and (g) optimizing agency productivity through technology.

- *Summary of Virginia's Ranking*

JYF museums are accredited by the American Association of Museums (AAM), a widely recognized seal of approval that brings national recognition to a museum for its commitment to excellence, accountability, high professional standards, and continued institutional improvement. Only approximately 5% of museums in the United States meet AAM's rigorous criteria for accreditation. JYF is also the leading provider of structured educational programs in the Commonwealth. JYF outreach education programs are endorsed by the National Council for the Social Studies, the nation's leading association of social studies educators. A Department of Education study found JYF education programs "to be exemplary of best practices in museum education, and suggests that they serve as a model for others who seek to form links between museums and schools."

- *Summary of Customer Trends and Coverage*

With respect to museum visitation, slightly over 81% of individual visitors to the JYF's museums come from out-of-state. States with the highest number of visitors include Pennsylvania, New York, New Jersey, Ohio, Maryland, California, Florida, Illinois and North Carolina. Both museums rank in the top 20 of Virginia tourist destinations.

Museum visitation climbed by 50% during the decade of the 1990s as JYF's marketing team expanded its niche marketing strategy to maximize the rate of return on the investment of limited advertising funds. However, visitation declined following the events of September 11, 2001, the 2002 sniper attacks along Interstate 95, and an economic downturn. JYF's advertising budget was reduced, as was destination advertising for Williamsburg as a whole. The impact was a reduction in visitation to 588,132 in FY2005 compared to 723,392 in FY2001. Total visitation at the museums totaled 972,707 in FY2007 in large measure due to the 2007 commemoration.

To address the impact of the aging of Virginia's population, the JYF museum educational programs have been expanded to attract senior citizens. Some examples include the "Legacy Learning" program, a "hands-on" educational program specifically marketed to seniors and the Gallery Sampler Tours at Jamestown Settlement, an abbreviated guided tour for those with limited mobility. Community outreach programs that extend the JYF museum programs to adult groups within a 150 mile radius also reach many senior citizens. Currently, the Foundation has capacity to serve additional seniors and there are no waiting lists. In addition, motorized wheelchairs are available and larger copy is used for exhibit displays. Publications and web-sites are designed for utilization by all age groups and retirement communities within a 300 mile radius are mailed marketing materials.

Future Direction, Expectations, and Priorities

- *Summary of Future Direction and Expectations*

During the 2008-2010 biennium, JYF expects to accomplish the following priorities:

- Board of Trustees will enhance governance systems through the strategic long-range planning process.
- Successfully operate and maintain a greatly expanded physical plant.
- Ensure sufficient front-line staff meet visitor expectations for their museum experience.
- Meet or exceed all of the state's financial, human resources, information technology, procurement and other administrative compliance requirements.
- Increase the diversity of our workforce.
- Provide reasonable incentives to retain key front-line staff.
- Provide on-site structured education programming for 212,000 students in FY2009 and 215,000 in FY2010.
- Achieve outreach education program student participation of 100,000 students, and conduct the programs in 70% of the Commonwealth's school districts in the 2008-2010 biennium.
- Meet or exceed the requirements for artifact loan agreements so that artifacts from international museums will be made available for display at JS.
- Acquire key artifacts that the board has identified to enhance the quality of exhibits at both museums.
- Ensure that all exhibits are well maintained and necessary repairs are made in a timely fashion.
- Maintain and refresh JYF's investment in technology infrastructure and capabilities.
- Ensure sufficient public access to JS ships and meet Board of Trustees expectations for JYF's sailing program.
- Wisely spend marketing funds to maximize the return on investment for every advertising dollar spent.

- Ensure superior safety and security for staff, the public, and our property.
 - Raise private funds to assist with programming and exhibit enhancements.
 - Maximize the net income from retail operations in order to increase non-general fund support for JYF programs.
 - Enhance governance systems to ensure state compliance requirements are met.
 - Successfully train, recruit and retain key staff.
 - Utilize technology to create effective programs and services and improve the management of JYF museums.
 - Recruit, retain and effectively utilize volunteers to meet agency objectives.
 - Host additional changing exhibits.
 - Build on public awareness developed by the commemoration into momentum for maintaining visitation in the upcoming biennium.
 - Strengthen staff morale and capabilities despite loss of personnel associated with commemoration.
 - Enhance existing marketing partnerships and encourage new partnerships.
 - Renovate and expand the Yorktown Victory Center gallery building, including the production of a new film.
 - Develop appealing special events that support the JYF educational mission and build awareness of museums.
 - Identify new and innovative ways to partner with schools, and investigate new opportunities for outreach educational programs.
- *Summary of Potential Impediments to Achievement*
Examples of impediments and/or potential impediments JYF faces in satisfying visitor expectations and achieving its mission are as follows:
 - Insufficient destination advertising for the Williamsburg area compared to advertising investments of competing travel destinations.
 - Downturn in the economy that will affect disposable income for consumers and school districts.
 - Reduced cooperative advertising programs in the Williamsburg area.
 - Length of stay for visitors that come to Williamsburg (the average 2006 visit was 4.4 days instead of 3.7 days visitors spent in 1995). A return to shorter visit duration could have a detrimental impact of the economy and our admissions.
 - Competitive employment market in Historic Triangle that makes recruiting and/or retaining volunteers and additional front-line staff difficult, as JYF faces expected higher-than-normal employee turnover.
 - Inability to attract and retain front-line staff adversely impacts our ability to meet visitor expectations.
 - Unexpected exhibit fabrication or construction project issues, such as unseasonably wet weather, that could delay a fabricator or contractor from project completion by the due date. Also, higher-than-average price increases for construction materials or contractors, given the huge amount of ongoing construction in the Historic Triangle and adjacent metropolitan areas.
 - Inability to perform all construction before and/or after hours of visitation and still meet deadlines.
 - Underfunded levels of maintenance pose a threat to visitors, artifacts and facilities.
 - Significant competition for private donations.
 - Limited market availability and cost of acquisition of artifacts.
 - Inability to control all variables and to predict precisely the visitation levels that will occur.
 - Loss of momentum due to loss of the commemorative awareness campaign that Jamestown 2007 provided.

Service Area List

Service Number	Title
425 145 01	Collections Management and Curatorial Services
425 145 03	Education and Extension Services
425 145 07	Operational and Support Services

Agency Background Information

Statutory Authority

§ 23-287 of the Code of Virginia establishes the Jamestown-Yorktown Foundation as an educational institution to administer certain historical museums and related programs. Jamestown-Yorktown Foundation's mission is to educate and to promote understanding and awareness of Virginia's role in the creation of the United States of America. The Foundation, accredited by the American Association of Museums, is an educational institution of the Commonwealth of Virginia and administers two living history museums. Jamestown Settlement interprets the cultures of 17th-century colonial Jamestown, America's first permanent English settlement, and the Powhatan Indians. The Yorktown Victory Center interprets the impact of the American Revolution on the people of America and the development of the new nation.

In addition, JYF has the authority to establish nonprofit corporations as instrumentalities to assist in administering JYF affairs and to receive and expend gifts, grants and donations from whatever source derived for JYF purposes.

JYF, with the consent of the Governor, may enter into agreements or contracts with private entities for the promotion of

tourism through marketing without competitive sealed bidding or competitive negotiation provided a demonstrable cost savings, as reviewed by the Secretary of Education, can be realized by the JYF and such agreements or contracts are based on competitive principles. It may also determine what paintings, statuary, works of art, manuscripts, and artifacts may be acquired by purchase, gift, or loan, and to exchange or sell the same if not inconsistent with the terms of such purchase, gift, loan or other acquisition.

Customers

Customer Group	Customers served annually	Potential customers annually
General public visitors	972,000	1,000,000
Private and corporate donors	3,400	5,000
Virginia public school divisions	132	132

Anticipated Changes To Agency Customer Base

Expectations are for visitation to decline, but not back to pre-commemoration levels. We expect future growth should trend upwards on average 2% per year from a lower FY08 figure.

With respect to sales of structured group educational programs to Virginia school districts, we expect a post-commemoration drop in participation to 212,000, which is approximately 80% of the FY2007 achievement. However, this is still 3% higher than FY2006, and we anticipate that structured educational programs will continue to be maintained at or near this level.

The number of Virginia school districts is relatively stable and the student population growth will, also, remain relatively flat. Limited opportunities may exist in unsatisfied demand from school districts that do not currently participate in our museum programs under the existing fee structure while past demand following the commemorative period participation may decline. Potential expansion of the National Outreach program may be possible. Through the potential of existing and emerging technology such as electronic media and web-based programming, JYF has an excellent opportunity to extend its products and services virtually to an almost limitless world-wide customer base.

Partners

Partner	Description
Colonial National Park- Historic Jamestowne	Joint destination messaging and promotion, joint special events, cooperative opportunities, joint ticketing, training and historical research to promote visitation and tourism growth.
Colonial Williamsburg Foundation; Busch Gardens; Water Country USA	Joint promotional and advertising efforts to maintain and stimulate visitation, economic tourism growth and non-general revenues. Cooperative efforts with the Colonial Williamsburg Foundation through Teacher Institutes.
Jamestown-Yorktown Educational Trust	The Jamestown-Yorktown Educational Trust provides financial support through its gift shop and food service operations.
Jamestown-Yorktown Foundation, Inc.	The Jamestown-Yorktown Foundation, Inc. (JYF, Inc.) coordinates private fund development in support of JYF programs. The JYF, Inc. is administered by a board of directors consisting of no more than 30 members, including at least three but no more than seven members of the JYF's board of trustees, as well as the trustees' chairman.
Landmark Volunteers	A national youth volunteer program focusing on service projects. JYF is one of 50 programs selected nationally.
The College of William & Mary	Joint effort offering Elderhostel programs.
Virginia Cooperative Extension 4-H Program	Partner to offer cooperative programs for youth in conjunction with James City County, York County and Gloucester County.
	Presents programs at conference and support

Virginia Council for the Social Studies	activities designed to strengthen school – museum partnership.
Virginia Department of Education	Cooperates with education program information distribution, lecture series support, and research.
Virginia Department of Historic Resources	JYF has short and long term loans of archaeological and other materials.
Virginia Tourism Corporation	Augments promotional and advertising efforts to maintain and stimulate visitation, economic tourism growth.
Williamsburg Area Convention and Visitors Bureau; Williamsburg Hotel/Motel Association	Joint promotional and advertising efforts to maintain and stimulate visitation, economic tourism growth and non-general revenues.

Products and Services

- *Description of the Agency's Products and/or Services:*

Open to the public year-round, JS and YVC museums present the story of the nation's beginnings, from the arrival of the first permanent English colonists in 1607 to the American Revolution and the adoption of the Constitution and Bill of Rights almost two centuries later. Both museums offer gallery exhibits, featuring a distinctive collection of 17th- and 18th-century artifacts, and living history in re-created settings: a Powhatan Indian village, colonial fort, riverfront discovery area and three 17th-century ship replicas at JS, and a Continental Army encampment and 1780s "middling" farm at YVC. JYF on-site and outreach education programs, which correlate with Virginia SOLs, allow students to use reproduction artifacts to explore 17th- and 18th-Virginia history. Structured on-site programs incorporate experiences in the outdoor interpretive areas.

- *Factors Impacting Agency Products and/or Services:*

Highly competitive labor market in the Historic Triangle.

- Staff turnover issues associated with a high reliance on part-time staff.
- Inadequate overall investment in advertising Williamsburg area as a tourism destination compared to what is being spent by competing destinations.
- Changing technology infrastructure and application needs.
- Increasing population of school children to be served with educational programming through technology – based educational programming.
- Maintaining and operating an expanded physical plant.
- Managing safety and security year round
- Heavy reliance upon non-general funding to support core programming and provide supplemental activities.
- Loss of Jamestown 2007 marketing investment in the tourism marketplace
- Changes in the world economy.

- *Anticipated Changes in Products or Services:*

During the upcoming biennium, JYF will continue investing time, people and other resources in the museums' product and services. For example, JYF has finalized the concept and programmatic elements of a virtual "electronic field trip" to reach hundreds or even thousands of students and visitors who might otherwise not have the opportunity to share in the museums' on-site programs. The nearly completed electronic field trip will be distributed nationally in the fall of 2007. With sufficient private funding, the development of a series of historical minutes on PBS radio will be distributed nationally. A new lecture series featuring nationally recognized academic experts is being considered and development of a "Legacy Lecture" by a well known national figure is contemplated should funding become available. JYF has implemented a new reservation ticketing system to help manage museum capacity in a visitor-friendly way to make a visit much more enjoyable while optimally utilizing the museum facilities. The 2006 Godspeed Sail not only brought national attention to the historically significant Jamestown commemoration, but created general awareness of the Jamestown story, which we can build on in future years. The loss of Jamestown 2007 marketing investment in the tourism marketplace will be significant. We must continue to create sustained demand by developing new programmatic elements, improving our use of technology and innovative ways to "get the word out" to the targeted markets.

Finance

- *Financial Overview:*

JYF funding of the base budget comes from general funds 52% and non-general fund sources including admissions revenue 48%.

- *Financial Breakdown:*

FY 2009

FY 2010

	General Fund	Nongeneral Fund	General Fund	Nongeneral Fund
Base Budget	\$8,926,129	\$8,346,487	\$8,926,129	\$8,346,487
Change To Base	\$0	\$0	\$0	\$0
Agency Total	\$8,926,129	\$8,346,487	\$8,926,129	\$8,346,487

This financial summary is computed from information entered in the service area plans.

Human Resources

- *Overview*

Currently JYF has an authorized maximum equivalency level (MEL) of 217. Eighteen of the 217 positions are of limited duration approved specifically to support the 2007 commemoration. Effective July 1, 2008 , JYF's authorized maximum equivalency level (MEL) will be 199. Of the 199 positions 119 are general funded positions with the remaining 80 positions supported with non - general funds.

JYF operates two educational living history museums (JS in Williamsburg and YVC in Yorktown) and a central support complex in York County. Many employees dealing directly with customers work at both education museums and may commute between locations daily. Employees responsible for facilities and maintenance may commute between all three locations daily.

Thirty-two percent of current on-board employees (184) are full-time, salaried staff (classified and excepted). Salaried positions include interpretive staff, maintenance staff, curatorial and exhibit services, as well as management, supervisory, or administrative positions.

With 67% of its paid staff being part-time, JYF is unlike many other state agencies. This percentage represents 352 wage employees, working a total of 258,480 hours during FY07, or 124.3 full-time equivalent positions. Wage employees are paid hourly and generally work no more than 1,500 hours per year, however, extensions were provided for specific positions during the commemorative period. For the most part, hourly positions are front-line, working directly with customers by providing education tours, gift shop services, visitor services, outreach instruction and costumed interpretation. Other hourly positions support finance, development, facilities, marketing and the executive offices.

JYF museums are open 363 days per year, closing only on Christmas and New Year's Day, therefore many of the hourly and classified positions must work weekdays and weekends. Additionally, many staff must work outside dealing with all types of weather conditions. Hours worked by part-time, hourly staff are 100% dependent on revenue earned and therefore may fluctuate dramatically. Approximately 37% of salaries for classified and excepted employees are dependent on non-general fund revenue.

- *Human Resource Levels*

Effective Date	7/1/2008
Total Authorized Position level	199
Vacant Positions	-19
Current Employment Level	180.0
Non-Classified (Filled)	0
Full-Time Classified (Filled)	179
Part-Time Classified (Filled)	1
Faculty (Filled)	0
Wage	117.6
Contract Employees	0
Total Human Resource Level	297.6

breakout of Current Employment Level

= Current Employment Level + Wage and Contract Employees

- *Factors Impacting HR*

Attracting essential human resources in the highly competitive local employment market will continue to be an issue in the 2008-2010 biennium. The Historic Triangle/ Peninsula region has other history museums that hire interpreters and

exhibits staff, a disproportionate number of hotels and motels that need housekeepers, and an expanding business community that are hiring administrative staff. Retaining productive staff and recruiting talented staff is challenging in this dynamic environment, but JYF continues to update its workforce planning and human resources policies and procedures to address this issue.

Expanding workforce diversity is another challenge. JYF continues to develop and implement strategies to engage a more diverse candidate pool from cities and counties surrounding Williamsburg and Yorktown. This will be especially challenging when confronted with rising gas prices and limited hours with no leave or health benefits for part-time employees.

The JYF Human Resources Office is losing current restricted staff that it used to not only meet the challenges of increased staffing during the commemoration, but enabled the agency to meet growing state compliance requirements and address major HR policy issues. The challenges previously listed and the issue of limited HR resources to address them will only be exacerbated by any reductions in general fund support during FY2008 that results from potential budget reductions due to a statewide shortfall in general fund revenues.

- *Anticipated HR Changes*

Human resource levels have been increasing steadily over the past few years. It is anticipated that funding will decrease once the commemorative period has passed. If this funding decrease adversely impacts workforce levels, human resources will face changes in numerous pay practice areas. These areas may include compensation, new hiring, competitive retention actions, training and employee recognition.

Projected visitation levels may exceed expectations, creating new and increasing permanent workload demands. A different set of human resource issues will arise including resource strategies for meeting workload expectations, justifications, negotiations for procuring additional staff (increased FTEs), increased recruitment efforts, and human resource program expansions.

Information Technology

- *Current Operational IT Investments:*

JYF primarily relies on off-the-shelf application packages for point-of-sale ticketing, gift shop sales and inventory, fundraising, collections management and accounting. These applications require intense levels of technology support to meet JFY-operational demands, periodic maintenance and upgrades to maintain functionality and provide JYF with the effective tools to manage business processes that generate 43% of its operating revenues. These systems are agency specific and are considered out-of-scope to the VITA memorandum of understanding.

An IT manager and database administrator are responsible for managing agency interaction with VITA for network and PC support, provide support to agency specific software, ensure integrity of databases, oversee report writing and coordinate software upgrades. In FY2008, two 1500 hour wage staff were added but the staffing level remains inadequate to manage ongoing agency technology demands.

As the use of web-based marketing initiatives and expanded reliance on new off-the-shelf software for marketing expands, more support of technology infrastructure will be essential.

In 2006, a new ticketing/reservation software package was implemented to support operations (ticketing, web-based ticketing, reservations, on-site education group scheduling, invoicing, etc.). The new software, while more powerful and robust, has resulted in greater agency support for the software than initially anticipated. Quarterly software releases are requiring greater levels of testing and verification prior to installation. While relying primarily on standard reports, custom reports are required to meet operating and reporting needs. The additional wage staff has allowed for additional report writing that has improved both customer service and operational efficiency.

The completion of museum and support facilities has resulted in campus-wide data and telecommunication wiring at Jamestown Settlement. The final connectivity to the newly constructed riverfront amenities building was completed in the summer of 2007. Bandwidth upgrades to maintain acceptable connectivity speeds between the three JYF physical locations prior to the 2007 commemoration were sufficient to handle the increase network traffic generated by increased visitation and impacting the ticketing/reservation and gift shop software systems.

- *Factors Impacting the Current IT:*

The largest factor impacting Information Technology is the need to provide support to museum operations that are open 363 days a year. The reliability of network support and infrastructure and operational support of front-line, business oriented operations such as tickets and gift shop point of sale machines are critical to the agency's ability to generate essential non-general fund revenue. The funding received to support VITA service rates was essential to maintaining IT service levels throughout the Foundation without impacting the museum and educational products.

Increased usage of the Internet, including on-line ticketing and internal Intranet to improve agency communications, have resulted in support backlogs for agency specific applications. More online educational information is being offered, including video content. Usage for marketing and administrative purposes will continue to grow.

- *Proposed IT Solutions:*

The proposed renovation at the Yorktown Victory Center may necessitate reconfiguration of the network infrastructure at this campus. Grandfathered demarcations sites for telephone service may be impacted, requiring new wiring and planning for telecommunication infrastructure.

The gift shop point-of-sale and inventory software is aging and a planned replacement by 2009 is scheduled.

To be responsive at Board meetings, community presentations, and donor solicitations, it is important to have software for video capture and editing. To support usage of newer technologies, the Foundation would like to accelerate use of Windows Vista and Vista Office Suite over the scheduled replacement cycle. In addition, key systems will require refresh more frequently than the standard five-year refreshment cycle. Procurement of the software for video presentations, wireless capability and DVD burners may be required above the standard configurations.

The Foundation was interested in pursuing an integrated financial accounting and management planning system for the agency and its affiliates. The Virginia Enterprise Applications Program will address many of the issues that the integrated system, including the need for a time and attendance system.

- *Current IT Services:*

Estimated Ongoing Operations and Maintenance Costs for Existing IT Investments

	Cost - Year 1		Cost - Year 2	
	General Fund	Non-general Fund	General Fund	Non-general Fund
Projected Service Fees	\$630,249	\$166,812	\$639,703	\$169,314
Changes (+/-) to VITA Infrastructure	\$0	\$0	\$0	\$0
Estimated VITA Infrastructure	\$630,249	\$166,812	\$639,703	\$169,314
Specialized Infrastructure	\$211,837	\$0	\$211,837	\$0
Agency IT Staff	\$0	\$0	\$0	\$0
Non-agency IT Staff	\$0	\$0	\$0	\$0
Other Application Costs	\$353,823	\$62,128	\$353,823	\$62,128
Agency IT Current Services	\$1,195,909	\$228,940	\$1,205,363	\$231,442

Comments:

[Nothing entered]

- *Proposed IT Investments*

Estimated Costs for Projects and New IT Investments

	Cost - Year 1		Cost - Year 2	
	General Fund	Non-general Fund	General Fund	Non-general Fund
Major IT Projects	\$0	\$0	\$0	\$0
Non-major IT Projects	\$0	\$0	\$0	\$0
Agency-level IT Projects	\$0	\$0	\$0	\$0
Major Stand Alone IT Procurements	\$0	\$0	\$0	\$0
Non-major Stand Alone IT	\$0	\$0	\$0	\$0

systems at Yorktown Victory Center, while ensuring the safety of public, staff, and artifacts.

- **Factors Impacting Capital Investments:**

The ability of JYF museums to maintain customer base and attract increased visitation is critical to (a) accomplish the agency's mission and (b) protect its tourism market share and thus, non-general fund revenue levels. If facilities and exhibits become too crowded, outmoded and outdated, have poorly functioning or non-functioning technology, or become unsafe, JYF will not be competitive in the broader tourism marketplace to attract a sufficient number of visitors and accomplishment of the agency's mission profoundly is threatened. Changes to agency's facilities and exhibits require significant planning time, and construction time is lengthy in order to phase improvements so the facility continues to operate in the interim. For example, Yorktown Victory Center's exhibits, which are already 12 years old, and 2 years beyond their useful life, cannot be totally implemented for four years, even if the proposed capital project is approved for the 2008-2010 biennium. Proactive planning and implementation of capital improvements is key to maintaining operations and non-general fund revenue streams into the future.

Technology changes also impact capital investment. New or improved technologies not only support expanded marketing initiatives and create possibilities for increased efficiencies, but they also result in elimination of supplies, vendor support, and replacement parts for existing technologies. JYF has experienced this in terms of lighting systems, video and sound systems, certain exhibitory, and security systems. A program to fund technology specific enhancements is badly needed.

If vehicles and other motorized equipment are not properly maintained and replaced on a reasonable cycle, productivity suffers and small problems can morph into more substantial issues that are not easily solved. Asset replacement must be funded in such a manner such that long –term operational effectiveness and long-term public product are preserved.

- **Capital Investments Alignment:**

JYF operates on a business model, and evaluates fixed assets in terms of criticality to mission, relative importance in an environment of limited resources, and return on investment, when possible. JYF capital investment has been the lifeblood of its ability to provide any volume of reasonable projected customers with quality products and services mandated by the Commonwealth's General Assembly. It underscores JYF's mission to educate, promote awareness and understanding of Virginia's role in the creation of the United States, and brings to life through facilities, artifacts and interpretation a meaningful representation of 17th-century Jamestown and 18th-century Yorktown.

Agency Goals

Goal 1

EDUCATION GOAL: Present and interpret the collections and interpretive scope through educational programs, exhibits, publications and innovative communications.

Goal Summary and Alignment

Educational programs, exhibits, publications and innovative communications technology facilitate the promotion of an understanding and awareness of Virginia's role in the creation of the United States of America.

Goal Alignment to Statewide Goals

- Elevate the levels of educational preparedness and attainment of our citizens.
- Protect, conserve and wisely develop our natural, historical and cultural resources.

Goal 2

COLLECTIONS GOAL: Work with private affiliates to collect and preserve objects and other materials relating to the interpretive scope and mission of JYF.

Goal Summary and Alignment

JYF collections support the educational mission of interpretation and preservation of the stories of Jamestown and the American Revolution.

Goal Alignment to Statewide Goals

- Elevate the levels of educational preparedness and attainment of our citizens.
- Protect, conserve and wisely develop our natural, historical and cultural resources.

Goal 3

ECONOMIC DEVELOPMENT GOAL: Promote tourism development and quality of life in the region and Commonwealth in a manner consistent with preserving the historic nature and integrity of the Jamestown-Yorktown-Williamsburg area and the Commonwealth.

Goal Summary and Alignment

As a result of its success in fulfilling its mission, JYF visitors spent an estimated \$132 million in the Historic Triangle in 2006- on hotel rooms, meals and other commodities, and visiting other attractions during their visit

Goal Alignment to Statewide Goals

- Be a national leader in the preservation and enhancement of our economy.
- Protect, conserve and wisely develop our natural, historical and cultural resources.

Goal 4

FACILITIES GOAL: Develop and maintain JYF buildings and grounds.

Goal Summary and Alignment

In order to fulfill its mission, JYF must have attractive, well designed facilities that adequately handle visitation demands and ensure the comfort and safety of staff, visitors and artifacts.

Goal Alignment to Statewide Goals

- Be recognized as the best-managed state in the nation.

Goal 5

MANAGEMENT AND GOVERNANCE GOAL: Ensure that all operations and programs are consistent with JYF's mission and comply with Board policies, government regulations, and professional museum standards.

Goal Summary and Alignment

In order to fulfill its mission with limited resources, JYF must operate under sound business principles and satisfy Commonwealth of Virginia state compliance requirements.

Goal Alignment to Statewide Goals

- Be recognized as the best-managed state in the nation.

Goal 6

MARKETING GOAL: Maximize public awareness of and interest in JYF's mission, living-history programs, educational opportunities and other programs and services, leading to increased paid attendance and earned income.

Goal Summary and Alignment

Non-general funds are essential for the operation of the JYF museums and an effective marketing operation is required to bring people to our sites so that the mission can be implemented.

Goal Alignment to Statewide Goals

- Be a national leader in the preservation and enhancement of our economy.
- Engage and inform citizens to ensure we serve their interests.

Goal 7

FUNDING GOAL: Ensure financial stability for operating, capital, maintenance and program expenses in support of JYF's mission and maximize support from the JYF's private affiliates.

Goal Summary and Alignment

Financial support from a variety of sources are required in order to implement JYF's mission.

Goal Alignment to Statewide Goals

- Be recognized as the best-managed state in the nation.

Goal 8

COMMONWEALTH PREPAREDNESS GOAL: We will strengthen the culture of preparedness across state agencies, their employees and customers.

Goal Summary and Alignment

This goal ensures compliance with federal and state regulations, policies and procedures for Commonwealth preparedness, as well as guidelines promulgated by the Assistant to the Governor for Commonwealth Preparedness, in collaboration with the Governor's Cabinet, the Commonwealth Preparedness Working Group, the Department of Planning and Budget and the Council on Virginia's Future. The goal supports achievement of the Commonwealth's statewide goal of protecting the public's safety and security, ensuring a fair and effective system of justice and providing a prepared response to emergencies and disasters of all kinds.

Goal Alignment to Statewide Goals

- Be recognized as the best-managed state in the nation.
-

Service Area Strategic Plan

Jamestown-Yorktown Foundation (425)

3/14/2014 2:57 pm

Biennium: 2008-10 ▼

Service Area 1 of 3

Collections Management and Curatorial Services (425 145 01)**Description**

This service area acquires and cares for 17th-century and 18th-century artifacts that provide museum visitors with an understanding of life during these centuries and serve to illustrate the historical themes in the JYF museum galleries.

Background Information**Mission Alignment and Authority**

- *Describe how this service supports the agency mission*

This service area directly supports educating, promoting understanding and awareness of Virginia's role in the creation of the United States of America. The artifacts serve as key illustrations of the three cultures interacting in 17th-century Jamestown and the impact of the American Revolution on the people of America.

- *Describe the Statutory Authority of this Service*

§ 23-287 of the Code of Virginia establishes the Jamestown-Yorktown Foundation as an educational institution to administer certain historical museums and related programs. Jamestown-Yorktown Foundation's mission is to educate and to promote understanding and awareness of Virginia's role in the creation of the United States of America. The Foundation, accredited by the American Association of Museums, is an educational institution of the Commonwealth of Virginia and administers two living history museums. Jamestown Settlement interprets the cultures of 17th-century colonial Jamestown, America's first permanent English settlement, and the Powhatan Indians. The Yorktown Victory Center interprets the impact of the American Revolution on the people of America and the development of the new nation.

In addition, JYF has the authority to establish nonprofit corporations as instrumentalities to assist in administering JYF affairs and to receive and expend gifts, grants and donations from whatever source derived for JYF purposes.

JYF, with the consent of the Governor, may enter into agreements or contracts with private entities for the promotion of tourism through marketing without competitive sealed bidding or competitive negotiation provided a demonstrable cost savings, as reviewed by the Secretary of Education, can be realized by JYF and such agreements or contracts are based on competitive principles. JYF may also determine what paintings, statuary, works of art, manuscripts and artifacts may be acquired by purchase, gift or loan, and to exchange or sell the same if not inconsistent with the terms of such purchase, gift, loan, or other acquisition.

Customers

Agency Customer Group	Customer	Customers served annually	Potential annual customers
Virginia public school divisions	General public visitors	972,000	1,000,000

Anticipated Changes To Agency Customer Base

We do not anticipate significant changes to our customer base.

Partners

Partner	Description
Jamestown-Yorktown Foundation, Inc.	The JYF, Inc. coordinates private fund development in support of JYF programs. The JYF, Inc. is administered by a board of directors consisting of no more than 30 members, including at least three but no more than seven members of the JYF's Board of Trustees, as well as the trustees' chairman.

Products and Services

- *Factors Impacting the Products and/or Services:*

Attendance is expected to trend upwards on average 2% per year from a trend established in FY08. Significant

national attention was brought to the JYF sites during the commemoration. Expectations, in terms of regional and state economic impact, remain high, but may wane over time. Refreshing the collection and exhibitry should prove to be challenging for the curatorial services while providing a satisfactory visitor experience.

- *Anticipated Changes to the Products and/or Services*

During the 2008-2010 biennium, JS will be developing and opening new changing gallery exhibits at JS. YVC also will be in the planning stages for the anticipated renovation and replacement of its galleries.

- *Listing of Products and/or Services*

- The product produced in this service area are 45,000 square feet of permanent galleries at YVC and JS and an additional 8,600 square feet of changing exhibit space The gallery can be a permanent gallery that is replaced every 10-15 years or a changing gallery that might be open for a period of three to 12 months. The information presented in the gallery must be well researched, clearly organized and well written, and artifacts must be purchased (through JYF's private affiliate), borrowed, and, in all cases, cared for according to American Association of Museum and artifact loan agreement standards to ensure that it will be equally available for future generations to see. Temperature, humidity and light levels must be closely monitored, and action taken to protect the artifacts if building systems are unable to meet standards.

Finance

- *Financial Overview*

Funding for Collections and Curatorial Services comes from general funds (43%) and from non-general funds (57%) - largely admissions revenue. Non-general funds from the agency's private affiliate, the JYF, Inc., are used to purchase and conserve artifacts on behalf of the state agency with donated funds. At the time of sale, ownership of the artifact is transferred to state government and placed under the state's self-insurance program. Additionally, public and private grants (both restricted and unrestricted) supplement non-general funds.

- *Financial Breakdown*

	FY 2009		FY 2010		FY 2009	FY 2010	FY 2009	FY 2010
	General Fund	Nongeneral Fund	General Fund	Nongeneral Fund				
Base Budget	\$315,887	\$419,066	\$315,887	\$419,066				
Change To Base	\$0	\$0	\$0	\$0				
Service Area Total	\$315,887	\$419,066	\$315,887	\$419,066				
Base Budget	\$315,887	\$419,066	\$315,887	\$419,066				
Change To Base	\$0	\$0	\$0	\$0				
Service Area Total	\$315,887	\$419,066	\$315,887	\$419,066				
Base Budget	\$315,887	\$419,066	\$315,887	\$419,066				
Change To Base	\$0	\$0	\$0	\$0				
Service Area Total	\$315,887	\$419,066	\$315,887	\$419,066				

Human Resources

- *Human Resources Overview*

[Nothing entered]

- *Human Resource Levels*

Effective Date	
Total Authorized Position level	0

Vacant Positions	0	
Current Employment Level	0.0	
Non-Classified (Filled)		breakout of Current Employment Level
Full-Time Classified (Filled)		
Part-Time Classified (Filled)		
Faculty (Filled)		
Wage		
Contract Employees		
Total Human Resource Level	0.0	= Current Employment Level + Wage and Contract Employees

- *Factors Impacting HR*
[Nothing entered]
- *Anticipated HR Changes*
[Nothing entered]

Service Area Objectives

- Manage and care for the collections, and for borrowed artifacts according to collections policy guidelines, AAM standards and artifact loan agreements.

Objective Strategies

- Review all aspects of collections management and policy to maintain American Association of Museums (AAM) accreditation.
- Review display cases, lighting and HVAC systems to ensure safety for both artifacts and the public.
- Monitor temperature and humidity in the galleries, assess collections management facility needs in accordance with guidelines and procedures, and integrate requirements into the JYF master planning process.
- Actively acquire artifacts for the collection using private funds according to the master artifact acquisition lists.
- Conduct historical research and make preparations for new exhibits during the biennium.
- Present lectures, staff training programs, respond to research requests from public, donors, and various federal and state agencies.
- Monitor and review collections storage conditions that meet or exceed best practices standards, regular update information catalogued in Vernon Collections Management system, review artifacts for conservation on a regular basis.
- Work effectively with major lenders such as British Museum to ensure loaned exhibits and artifacts are stored in appropriate conditions, artifact mounting meets or exceeds standards, and that all curatorial issues are addressed and resolved without adverse impact on the exhibition schedule.
- Conduct primary research that will serve as the basis for all exhibits utilizing staff, interns, volunteers, and outside scholars as available.

Link to State Strategy

- nothing linked

Objective Measures

- Number of artifacts in the JYF collection damaged or lost while in JYF custody.

Measure Class: Measure Type: Measure Frequency: Preferred Trend:

Measure Baseline Value: Date:

Measure Baseline Description: Zero in FY2006.

Measure Target Value: Date:

0

6/30/2009 Measure Target Description: Zero occurrences of lost or damaged artifacts.

Data Source and Calculation: No occurrences of lost or damaged artifacts.

Service Area Strategic Plan

Jamestown-Yorktown Foundation (425)

3/14/2014 2:57 pm

Biennium: 2008-10 ▼

Service Area 2 of 3

Education and Extension Services (425 145 03)

Description

Education and Extension Services includes six areas:

- 1) The visitor services office provides ticket sales and customer service to visitors at two museums.
- 2) The interpretative services office provides costumed historical interpretation for visitors at two museums, as well as the production of reproduction historical costumes for interpretive staff to wear.
- 3) On-site education provides guided tours and hands-on educational classroom programs to school groups visiting the museums, as well as summer children's programs.
- 4) The maritime services office provides the maintenance for three replica ships (Discovery, Godspeed, and Susan Constant) and oversees the sailing of the ships for educational outreach programs.
- 5) Exhibit services designs, fabricates and maintains exhibit displays for the museum galleries and outdoor interpretive areas.
- 6) Outreach education and special services includes five areas of responsibility: outreach education, group reservations, volunteer services, customer research, training and development.

Background Information

Mission Alignment and Authority

- *Describe how this service supports the agency mission*

Education and Extension Services provides the front-line programming and customer service for JS and YVC visitors. The educational mission includes promoting understanding and awareness of Virginia's role in the creation of the United States. Education and Extension Services directly provide the educational product for visitors, sells tickets to and assists visitors so they can experience the museums, and maintain ships and provides maritime outreach programs. Outreach education and special services directly provides museum educational programs in classrooms throughout Virginia, carrying JYF's mission to them during the entire academic year. Many students would not be able to experience JYF's offerings without the outreach programs.

- *Describe the Statutory Authority of this Service*

§ 23-287 of the Code of Virginia establishes the JYF as an educational institution to administer certain historical museums and related programs. Jamestown-Yorktown Foundation's mission is to educate and to promote understanding and awareness of Virginia's role in the creation of the United States of America. The Foundation, accredited by the American Association of Museums, is an educational institution of the Commonwealth of Virginia and administers two living history museums. Jamestown Settlement interprets the cultures of 17th-century colonial Jamestown, America's first permanent English settlement, and the Powhatan Indians. The Yorktown Victory Center interprets the impact of the American Revolution on the people of America and the development of the new nation.

In addition, JYF has the authority to establish non-profit corporations as instrumentalities to assist in administering JYF affairs and to receive and expend gifts, grants and donations from whatever source derived for JYF purposes.

JYF, with the consent of the Governor, may enter into agreements or contracts with private entities for the promotion of tourism through marketing without competitive sealed bidding or competitive negotiation provided a demonstrable cost savings, as reviewed by the Secretary of Education, can be realized by JYF and such agreements or contracts are based on competitive principles. JYF may also determine what paintings, statuary, works of art, manuscripts and artifacts may be acquired by purchase, gift or loan, and to exchange or sell the same if not inconsistent with the terms of such purchase, gift, loan or other acquisition.

Customers

Agency Customer Group	Customer	Customers served annually	Potential annual customers
General public visitors	General public visitors	972,000	1,000,000
Virginia public school divisions	Virginia public school divisions	132	132

Anticipated Changes To Agency Customer Base

The number of Virginia school districts is relatively stable, the student population growth will, also, remain relatively flat. Limited opportunities may exist in the unsatisfied demand generated from school districts that do not currently participate in museum programs and the constant turnover of grade, middle and high school student populations in school districts already served. However, through the potential of existing and emerging technology, JYF has greater opportunity to extend products and services virtually to an almost limitless world-wide customer base.

As new or reinterpreted facts, artifacts and theories evolve, JYF efforts to accurately convey this emerging information from museum exhibits services staff and academic colleagues represents a very fluid customer base. This base includes JYF staff, teachers at all levels, historians, writers of historical fiction, researchers, interpreters, archaeologists and curators as well as museum visitors.

Though the Jamestown 400th Anniversary Commemoration and the 225th anniversary of the Siege of Yorktown have concluded, potential donors will still be vigorously sought after by JYF and its affiliates. While that pool of potential contributors remains relatively constant, potential donors may be drawn to other programs and JYF could lose crucial support.

Expectations are for visitation to decline, but not back to pre-commemoration levels. We expect future growth should trend upwards on average 2% per year from a lower FY08 figure.

Partners

Partner	Description
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[None entered]

Products and Services

- *Factors Impacting the Products and/or Services:*

Customers for outreach and on-site structured education programs are impacted by school budgets. JYF current service level is 150,298 students for outreach education and 263,773 for on-site education. These levels can be affected by variable transportation costs.

Customers for customer research and security include all on-site visitors to JYF's museums. Increased visitors create an increased need for the level of service and quality of product provided.

Marketing investments and the economy affect visitation levels.

Customers for training and volunteer services include all JYF staff, paid and volunteer. JYF budgets impact the number of employees who require training and volunteers who can be recruited.

Beginning in 2008 the agency will engage in a process to achieve reaccreditation by the American Association of Museums. This course of action involves a year-long intensive self-study of every element of organizational structure, operations, and programming, followed by an accreditation panel review and on-site visit by an accreditation team. The process is exhaustive and demanding and may be complicated by the ensuing post commemorative transition.

- *Anticipated Changes to the Products and/or Services*

In the post commemorative period:

Stations must be maintained in each interpretative area due to the projected base level of demand for products and services.

Sustain skill demonstrations and pageantry that fulfill visitor expectations for a high level of quality programming.

Frequent daily guided tours meeting the demands of the higher customer base will still be necessary.

The high activity of dramatic daily programming including readings, lectures and amphitheater programs continue.

Sustained staffing levels to facilitate the extensive programming will be needed.

- *Listing of Products and/or Services*

- Museum: Tour and program reservations service to individual groups, tour companies and Virginia schools as well as school groups outside of the Commonwealth. Advance and on-site ticket sales to both museums as well as combination tickets to community partners' attractions. Museum exhibits, film viewing and special events can be accessed at the museums.
- Outreach education programs: Teachers with reproduction artifacts traveling to classrooms throughout the state, utilizing museum programming in their teaching objectives.

- Teacher workshops and institutes: Conduct teacher institutes and workshops so that teachers may better utilize the museum experiences within their own classroom to better teach to the Commonwealth's Standards of Learning.
- Staff training programs and materials: Training for JYF staff and volunteers to effectively serve the public and carry out JYF's mission.
- Customer research reports: Visitor surveys and processes data from teacher evaluation forms and visitor comment cards. Also, calculate JYF's economic impact and assists marketing with visitor projections.
- Education and customer service: Education and customer service to the daily visitor, including school groups, organizations, and other groups or units through the use of visitor services staff, interpreters, teachers, material culture, programming and reproduction site areas to give the visitor the most meaningful experience possible.

Finance

● *Financial Overview*

Funding for Education and Extension Services come from general funds (45%) and from non-general funds (55%) - largely admissions revenue.

● *Financial Breakdown*

	FY 2009		FY 2010		FY 2009	FY 2010
	General Fund	Nongeneral Fund	General Fund	Nongeneral Fund		
Base Budget	\$2,752,722	\$3,330,417	\$2,752,722	\$3,330,417		
Change To Base	\$0	\$0	\$0	\$0		
Service Area Total	\$2,752,722	\$3,330,417	\$2,752,722	\$3,330,417		
Base Budget	\$2,752,722	\$3,330,417	\$2,752,722	\$3,330,417		
Change To Base	\$0	\$0	\$0	\$0		
Service Area Total	\$2,752,722	\$3,330,417	\$2,752,722	\$3,330,417		

Human Resources

● *Human Resources Overview*

[Nothing entered]

● *Human Resource Levels*

Effective Date		
Total Authorized Position level	0	
Vacant Positions	0	
Current Employment Level	0.0	
Non-Classified (Filled)		} breakout of Current Employment Level
Full-Time Classified (Filled)		
Part-Time Classified (Filled)		
Faculty (Filled)		
Wage		
Contract Employees		
Total Human Resource Level	0.0	= Current Employment Level + Wage and Contract Employees

● *Factors Impacting HR*

[Nothing entered]

- *Anticipated HR Changes*

[Nothing entered]

Service Area Objectives

- We will provide museum experience which results in at least a 95% positive rating on our customer surveys.

Alignment to Agency Goals

- Agency Goal: EDUCATION GOAL: Present and interpret the collections and interpretive scope through educational programs, exhibits, publications and innovative communications.
- Agency Goal: MARKETING GOAL: Maximize public awareness of and interest in JYF's mission, living-history programs, educational opportunities and other programs and services, leading to increased paid attendance and earned income.

Objective Strategies

- Implement the master education plan to coordinate all education and interpretive programs, projects, and services based on current and projected levels of attendance and current service. Review and revise plan on an annual basis.
- Coordinate and assess learning goals of education programs in relation to the Commonwealth's Standards of Learning.
- Offer dynamic and engaging multi-year on-site gallery exhibit programs and outdoor living-history programs to visitors.
- Manage and care for the approximately 52,000 square feet of gallery exhibits and 23 outdoor living-history exhibits at Jamestown Settlement and Yorktown Victory Center.
- Provide an effective customer research program that assesses the quality and effectiveness of the visitor experience.
- Provide efficient, customer-friendly tour reservation service for groups utilizing JYF resources.
- Conduct professional, informative orientations and tours of the museums or outdoor areas as resources allow.
- Support the Museums & Programs Advisory Council (MPAC) in its review and evaluation of JYF education programming, changing exhibits plans, gallery planning process, and living history area improvements.
- Conduct primary research that will serve as the basis for all programs utilizing staff, interns, volunteers, and outside scholars as available.
- Maintain cooperative education programs with museums and other nationally known historic sites as resources allow.
- Collaborate with public school systems and institutions of higher learning to enhance teacher education, as resources allow.
- Expand programs and services for diverse audiences (e.g., family, adult, special needs, educators, and other professionals), as resources allow.
- Implement board-approved plans.
- Provide special educational and interpretive programming for public during the 2008 – 2010 biennium, including hands-on presentation, special interpretive demonstrations, and weapon firing drills as resources allow.
- Provide appropriate tools, including museum guides, to visitors to enhance wayfinding and access to galleries, outdoor interpretive areas and programs.
- Provide a maritime outreach program.
- Maintain accreditation by the American Association of Museums.

Link to State Strategy

- nothing linked

Objective Measures

- Per Cent of visitors surveyed rating their experience good or excellent.

Measure Class: Measure Type: Measure Frequency: Preferred Trend:

Measure Baseline Description: 2004: 95+%

Measure Target Value: Date:

Measure Target Description: 95% or better rating

Data Source and Calculation: Visitor survey:[number of good responses + number of excellent responses] / total number of responses x 100.

- We will extend Outreach education programs to serve 100,000 students in 70% of Virginia school districts each year of the 2008 - 2010 biennium.

Alignment to Agency Goals

- Agency Goal: EDUCATION GOAL: Present and interpret the collections and interpretive scope through educational programs, exhibits, publications and innovative communications.

Objective Strategies

- Implement, review and annually revise the master education plan to coordinate all education and interpretive programs, projects, and services based on current and projected levels of attendance and current service.
- Implement board-approved program of statewide outreach in throughout Virginia.
- Provide a maritime outreach program.

Link to State Strategy

- nothing linked

Objective Measures

- Number of students served by Outreach education programs in each fiscal year of the 2008-2010 biennium.

Measure Class: Measure Type: Measure Frequency: Preferred Trend:

Measure Baseline Value: Date:

Measure Baseline Description: 99,878 students in 117 districts served in FY2005

Measure Target Value: Date:

Measure Target Description: 100,000 students in 70% of Virginia school districts.

Data Source and Calculation: Outreach education programs students; count the number of students served.

- We will extend on-site structured education programs to serve 212,000 students in FY2009 and 215,000 in FY2010.

Objective Description

During the 2008-2010 biennium, increase the number of on-site structured education programs over FY2005.

Alignment to Agency Goals

- Agency Goal: EDUCATION GOAL: Present and interpret the collections and interpretive scope through educational programs, exhibits, publications and innovative communications.

Objective Strategies

- Implement, review and annually revise the master education plan to coordinate all education and interpretive programs, projects, and services based on current and projected levels of attendance and current service annual basis.
- Provide efficient, customer-friendly tour reservation service for groups utilizing JYF resources.
- Provide special educational and interpretive programming for public during the 2008 – 2010 biennium, including hands-on presentation, special interpretive demonstrations, and weapon-firing drills.

Link to State Strategy

- nothing linked

Objective Measures

- Number of on-site structured education students served.

Measure Class: Measure Type: Measure Frequency: Preferred Trend:

Measure Baseline Value: Date:

Measure Baseline Description: 206,253 students served in FY2005.

Measure Target Value: Date:

Measure Target Description: 212,000 on-site structured education students per fiscal year during FY09 and 215,000 in FY2010.

Data Source and Calculation: Students served by on-site structured education programs: count number of served students

Service Area Strategic Plan

Jamestown-Yorktown Foundation (425)

3/14/2014 2:57 pm

Biennium: 2008-10 ▼

Service Area 3 of 3

Operational and Support Services (425 145 07)

Description

Operational and Support Services includes the following areas: Finance, Human Resources, Safety and Security, Marketing and Retail Operations, Development, Facilities and Maintenance and the Deputy Executive and Executive offices.

Background Information

Mission Alignment and Authority

- Describe how this service supports the agency mission

Operational and Support Services supports the JYF mission, as well as the statewide goal of being recognized as the best managed state in the nation, by providing the executive leadership and day-to-day critical services to the museums and its operation.

- Describe the Statutory Authority of this Service

§ 23-287 of the Code of Virginia establishes JYF as an educational institution to administer certain historical museums and related programs. Jamestown-Yorktown Foundation's mission is to educate and to promote understanding and awareness of Virginia's role in the creation of the United States of America. The Foundation, accredited by the American Association of Museums, is an educational institution of the Commonwealth of Virginia and administers two living history museums. Jamestown Settlement interprets the cultures of 17th-century colonial Jamestown, America's first permanent English settlement, and the Powhatan Indians. The Yorktown Victory Center interprets the impact of the American Revolution on the people of America and the development of the new nation.

In addition, JYF has the authority to establish nonprofit corporations as instrumentalities to assist in administering JYF affairs and to receive and expend gifts, grants and donations from whatever source derived for JYF purposes.

JYF, with the consent of the Governor, may enter into agreements or contracts with private entities for the promotion of tourism through marketing without competitive sealed bidding or competitive negotiation provided a demonstrable cost savings, as reviewed by the Secretary of Education, can be realized by JYF and such agreements or contracts are based on competitive principles. It may also determine what paintings, statuary, works of art, manuscripts, and artifacts may be acquired by purchase, gift or loan, and to exchange or sell the same if not inconsistent with the terms of such purchase, gift, loan or other acquisition.

Customers

Agency Customer Group	Customer	Customers served annually	Potential annual customers
	APA	1	1
	BCOM	1	1
	DPB	1	1
	General Assembly	1	1
	Governor	1	1
	Jamestown-Yorktown Educational Trust Board of Directors	1	1
General public visitors	Jamestown-Yorktown Foundation Board of Trustees	1	1
	Jamestown-Yorktown Foundation, Inc. Board of Directors	1	1
	Paid and Volunteer Staff	342	0
Private and corporate donors	Private and corporate donors	3,400	5,000
	Secretary of Education	1	1

The Foundation's museums

2

2

Anticipated Changes To Agency Customer Base

[Nothing entered]

Partners

Partner	Description
Jamestown-Yorktown Educational Trust, Ltd.	The Jamestown-Yorktown Educational Trust Limited ("Trust") exists because of, and for the ultimate benefit of, the Jamestown-Yorktown Foundation ("Foundation"), an agency of the Commonwealth of Virginia. The Trust serves as a vehicle to support the Foundation's concession and enterprise operations and, upon request by the Foundation, assist in the transition of assets on behalf of the Foundation.
Jamestown-Yorktown Foundation, Inc.	JYF, Inc. coordinates private fund development in support of JYF programs. JYF, Inc., through receipt of private donations and gifts, expends funds to benefit the operations and educational programs of the JYF museums.

Products and Services

- *Factors Impacting the Products and/or Services:*

The continuing demands of the post-commemoration period will stretch the capabilities and capacities of Operational and Support Services to its limit during the 2008 - 2010 biennium. Retention of key employees and crucial support of needed resources will be vital to morale, productivity and quality service levels.

- *Anticipated Changes to the Products and/or Services*

While managing to changing service levels preceding and during the commemoration presents its own set of critical issues, equally challenging will be the management of the post-commemorative transition.

- *Listing of Products and/or Services*

- Finance Department: Maintains accurate accounts payable and receivables. Provides other accounting functions including payroll, budget analysis and procurement. Prepares background information and recommendations for budget amendments. Prepares monthly financial reporting for two state and agencies and three private affiliates that clearly delineates each entity's financial support. Prepares accurate, timely financial reporting for grants and restricted gift donations.
- Facilities and Maintenance: Provides the management and delivery of JYF's capital program and maintenance of its facilities and equipment.
- Marketing and Retail Operations: Department designs and implements marketing programs, including advertising, media relations services, sales and promotions, on-site advertising agency and graphic design and the historyisfun.org marketing Web site, and manages on-site retail and food services to generate paid admissions to JS and the YVC.
- Development: The Development Office provides full strategic and operational support to fund development efforts of JYF and its non-profit affiliate, JYF, Inc.
- Human Resources: Provides human resource support to internal and external customers. Enforcement of state employment regulations, listing of new positions, processing of newly hired employees, employee benefit advisement, and records management.
- Security and Safety Services: Provides a safe environment for visitors and staff, and to protect the collections, facilities and other physical assets of JYF against loss from fire, theft and willful destruction.
- Executive and Deputy Executive Offices: Provides the leadership and management of JYF.
- Information Technology: Supports the critical business objectives of JYF through hardware and software applications specific to the agency and oversees network and desktop service provided by VITA

Finance

- *Financial Overview*

Funding for Operational and Support Services comes from general funds (56%) and from non-general funds (44%)-largely admissions revenue.

- *Financial Breakdown*

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	FY 2009		FY 2010	
	General Fund	Nongeneral Fund	General Fund	Nongeneral Fund
Base Budget	\$5,857,520	\$4,597,004	\$5,857,520	\$4,597,004
Change To Base	\$0	\$0	\$0	\$0
Service Area Total	\$5,857,520	\$4,597,004	\$5,857,520	\$4,597,004

Human Resources

- *Human Resources Overview*

[Nothing entered]

- *Human Resource Levels*

Effective Date		
Total Authorized Position level	0	
Vacant Positions	0	
Current Employment Level	0.0	
Non-Classified (Filled)		} breakout of Current Employment Level
Full-Time Classified (Filled)		
Part-Time Classified (Filled)		
Faculty (Filled)		
Wage		
Contract Employees		
Total Human Resource Level	0.0	= Current Employment Level + Wage and Contract Employees

- *Factors Impacting HR*

[Nothing entered]

- *Anticipated HR Changes*

[Nothing entered]

Service Area Objectives

- JYF will meet or exceed the state compliance established under the Virginia Performs program.

Alignment to Agency Goals

- Agency Goal: MANAGEMENT AND GOVERNANCE GOAL: Ensure that all operations and programs are consistent with JYF's mission and comply with Board policies, government regulations, and professional museum standards.

Objective Strategies

- Promote working relationship between JYF and its private affiliates.
- Continue evaluation of JYF's management and operation systems.
- Ensure qualified paid and volunteer staff are attracted and retained.
- Ensure that the agency adheres to all state and other government policies and regulations (e.g., financial, procurement, human resources, and capital outlay).
- Every other year, review and revise with the Board of Trustees the Strategic Long-Range Plan.
- Ensure effective board and committee meetings.
- Enhance communications and working relationships between staff and boards.
- Provide timely and relevant financial reporting to effectively manage JYF and private affiliate resources.

- Intensify efforts beyond that permitted under the base budget to attract and retain qualified volunteers and staff, as resources allow.
- Significantly increase JYF's competitiveness to attract and retain qualified personnel in keeping with state policy.
- Make greater use of technology to communicate with the public and to operate in a more effective and efficient manner.
- Maintain sufficient staffing and resources to meet compliance and service levels while operating in an effective and efficient manner.
- Promote adequate state government support for operating, capital and maintenance expenses.
- Maximize non-general fund income from gift shops and commissions.
- Develop national, regional and local awareness of JYF among potential visitors, the legislature, government agencies and local residents.
- Extend JYF educational mission through the sale of historically relevant and educational products.
- Enhance ongoing cooperation and explore future promotional and working opportunities with other agencies.
- Implement the agency's Capital Improvement Plan in conjunction with the provisions of the Commonwealth of Virginia Construction and Professional Services Manual.
- Construct necessary improvements to the museums to ensure their continued ability to attract visitation and generate non-general fund revenue.
- Provide sufficient security to safeguard artifacts and provide public safety.
- Maintain memberships in professional organizations, attend professional conferences and meetings, and subscribe to professional publications in order to keep abreast of the innovations and news within the museum community and within the state government.
- Maintain the agency's state website in accordance with regulatory requirements.
- Annually review / assess internal tools such as bylaws, statements of purpose, board criteria, board responsibilities, annual goals, and related external materials to ensure / establish protocol for the JYF and its affiliates.
- Use agency assessment, performance, and budgeting data to evaluate agency resources.
- Incorporate Governor's initiatives as they relate to JYF in agency planning whenever feasible.
- Maintain contact with central state agencies and federal and local agencies to maintain awareness of agency needs.
- Monitor the need for board meetings or similar forums and convene such forums as needed.
- Maintain active membership roster and hold functions for The Council, an organizational affiliate consisting of former board members, to enlist their assistance as long-term ambassadors of the Foundation and private affiliate organizations.
- Work with board committees to communicate agency resource and personnel needs and provide accurate timely information concerning JYF and private affiliate resource requirements.
- Provide the fiscal, personnel and organizational resources, and structure necessary to support activities planned and implemented during the 2008 - 2010 biennium.

Link to State Strategy

- nothing linked

Objective Measures

- Per Cent of Governor's Management Scorecard that meet expectations.

Measure Class: Measure Type: Measure Frequency: Preferred Trend:

Measure Baseline Value: Date:

Measure Baseline Description: 83% in FY2005.

Measure Target Value: Date:

Measure Target Description: 100%

Data Source and Calculation: Percent of Governor's Management scorecard categories marked as meets expectations for the agency

- Generate admissions revenue through an effective marketing program.

Alignment to Agency Goals

- Agency Goal: ECONOMIC DEVELOPMENT GOAL: Promote tourism development and quality of life in the region and Commonwealth in a manner consistent with preserving the historic nature and integrity of the Jamestown-Yorktown-Williamsburg area and the Commonwealth.
- Agency Goal: MARKETING GOAL: Maximize public awareness of and interest in JYF's mission, living-history programs, educational opportunities and other programs and services, leading to increased paid attendance and earned income.

Objective Strategies

- Operate in-house advertising agency and media placements.
- Actively manage admission rate pricing strategy and develop ticket products.
- Media relations promotional efforts.
- Utilize Internet-based marketing strategies including marketing web site.
- Expand group sales and packaged tours growth.
- Manage off-site museum admission ticket sales.
- Promote sale of combination and co-op tickets.

Link to State Strategy

- nothing linked

Objective Measures

- The ratio of paid admission revenue to the direct media advertising expense.

Measure Class: Measure Type: Measure Frequency: Preferred Trend:

Measure Baseline Value: Date:

Measure Baseline Description: 5 to 1 in FY2005.

Measure Target Value: Date:

Measure Target Description: A ratio of 5 to 1.

Data Source and Calculation: The paid admission revenue divided by the actual direct media advertising expense expressed as a ratio: x revenue to y expense

- Increase admissions revenues by 33% in FY2009 and 38% in FY2010 over FY2005 collections.

Alignment to Agency Goals

- Agency Goal: FUNDING GOAL: Ensure financial stability for operating, capital, maintenance and program expenses in support of JYF's mission and maximize support from the JYF's private affiliates.

Objective Strategies

- Develop a new, resourceful advertising and marketing programs.
- Manage admission rate pricing strategy to maximize per capita sales while maintaining paid visitation base.
- Participate in destination cooperative advertising and marketing initiatives.
- Expand coverage of JYF museums, education programs, exhibits and special events through media relations efforts.
- Expand group sales and packaged tours and publish and distribute annual group planner.

- Support JYF educational tours by publishing and distributing an educational planner targeted to schoolteachers and administrators.
- Engage local tourism and business audiences by hosting appropriate events at the museums.
- Enhance existing JYF marketing web site monthly to promote special events, vacation packages, education programs, extended hours, educational programs and other marketing initiatives and sell admission tickets on-line.
- Utilize standard JYF customer research as well as state, national and international data to track visitor demographics and behaviors to aid in planning targeted marketing and advertising programs
- Design and replenish supply of four-color brochures and other printed materials used for broad-based marketing initiatives and throughout the agency.
- Provide friendly and efficient customer service to visitors, internal and external customers.

Link to State Strategy

- nothing linked

Objective Measures

- Annual percentage increase in admissions revenues.

Measure Class: Measure Type: Measure Frequency: Preferred Trend:

Frequency Comment: June 2009; June 2010

Measure Baseline Value: Date:

Measure Baseline Description: FY2005 admissions revenue of \$4,108,940.

Measure Target Value: Date:

Measure Target Description: 33% increase over the baseline in FY2009 and 38% over baseline in FY2010.

Data Source and Calculation: ((FY2009 or FY2010 Admissions revenue minus \$4,180,940) divided by \$4,180,940) times 100.

- Maintain lean, but functional facilities and grounds operation in order to provide a positive visitor experience.

Alignment to Agency Goals

- Agency Goal: FACILITIES GOAL: Develop and maintain JYF buildings and grounds.

Objective Strategies

- Maintain sufficient staffing and resources to meet compliance and service levels while operating in an effective and efficient manner.
- Operate and maintain additional buildings and expanded grounds in accordance with JYF standards.
- Operate and maintain facilities during periods of peak visitation.
- Provide ongoing engineering/project supervision services in order to identify facilities issues, design improvements, calculate detailed project costs, and ensure quality workmanship.
- Provide landscaping improvements in fulfillment of the landscape plan and the need to screen view sheds in order to improve the public product.

Link to State Strategy

- nothing linked

Objective Measures

- Number of complaints concerning the maintenance or operation of the JYF facilities noted on the visitor surveys.

Measure Class: Measure Type: Measure Frequency: Preferred Trend:

Measure Baseline Value: Date:

Measure Baseline Description: Percentage of Complaints

Measure Target Value: Date:

Measure Target Description: Complaints < 5%.

Data Source and Calculation: Number of complaints concerning the maintenance or operation of the JYF facilities noted on the visitor surveys divided by the total number of visitor surveys taken times 100.

- Maintain the number of donors making cash or in-kind donations.

Alignment to Agency Goals

- Agency Goal: FUNDING GOAL: Ensure financial stability for operating, capital, maintenance and program expenses in support of JYF's mission and maximize support from the JYF's private affiliates.

Objective Strategies

- Increase the levels of private sector support, so that artifact acquisition, selected programs, selected programmatic elements, selected capital projects, and Development Office operations can be fully funded by JYF's private affiliate.
- Increase opportunities for private sector funding support for the expansion of educational programs and projects.

Link to State Strategy

- nothing linked

Objective Measures

- The number of donors making cash or in-kind donations in FY2009 and FY2010.

Measure Class: Measure Type: Measure Frequency: Preferred Trend:

Measure Baseline Value: Date:

Measure Baseline Description: FY2006

Measure Target Value: Date:

Measure Target Description: Maintain at FY06 level: 2878

Data Source and Calculation: Number of donors making cash or in-kind donations in FY2009 and FY2010.

- We will be prepared to act in the interest of the citizens of the Commonwealth and its infrastructure during emergency situations by actively planning and training both as an agency and as individuals.

Alignment to Agency Goals

- Agency Goal: COMMONWEALTH PREPAREDNESS GOAL: We will strengthen the culture of preparedness across state agencies, their employees and customers.

Objective Strategies

- The agency Emergency Coordination Officer will stay in continuous communication with the Office of Commonwealth Preparedness and the Virginia Department of Emergency Management

Link to State Strategy

- nothing linked