

2014-16 Strategic Plan

Jamestown-Yorktown Foundation [425]

Mission

Jamestown-Yorktown Foundation (JYF), an educational institution of the Commonwealth of Virginia, shall foster through its living history museums – Jamestown Settlement and Yorktown Victory Center – awareness and understanding of the early history, settlement, and development of the United States through the convergence of American Indian, European, and African cultures and the enduring legacies bequeathed to the nation.

Vision

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;
- implements effective marketing and communication programs to reach the public;
- serves as a model workplace in terms of fairness, diversity and team spirit; and
- demonstrates best practices in the museum field.

Values

- Integrity
- Effective Communication
- High Quality of Customer Service
- Creativity and Innovation
- Fairness
- Consistency of Effort
- Best Practices

Finance

Financial Overview

JYF funding of the base budget comes from general funds (48 percent) and nongeneral fund sources including admissions revenue (52 percent).

Biennial Budget

	2015 General Fund	2015 Nongeneral Fund	2016 General Fund	2016 Nongeneral Fund
Initial Appropriation for the Biennium	7,408,267	7,939,028	8,027,129	7,950,739
Changes to Initial Appropriation	232,000	0	458,776	0

(Changes to Initial Appropriation will be 0 when the plan is created. They will change when the plan is updated mid-biennium.)

Customers

Anticipated Changes to Customer Base

Declining overall visitation to the Williamsburg area, inconsistent consumer confidence levels, and transportation costs have translated into visitation declines in both individual and school visitors. Since the Jamestown quadricentennial, Williamsburg has experienced a steady decline in tourism levels that do not reflect trends in the national economy.

The number of Virginia school districts is relatively stable and student population growth will remain relatively flat. JYF is making strides increasing educational services to private schools, home-schooled children and out-of-state school divisions. Through the potential of existing and emerging technology, JYF has greater opportunity to extend products and services to an almost limitless world-wide customer base.

The pool of potential contributors remains relatively constant and there is the risk that potential donors may be drawn to other programs and JYF could lose crucial support.

Current Customer List

Predefined Group	User Defined Group	Number Served Annually	Potential Number of Annual Customers	Projected Customer Trend
Tourist	General public visitors and tour groups	560,072	700,000	Decrease
Student	Virginia public school divisions (Outreach)	106	132	Increase
Student	The Foundation's museums	2	2	Stable
State Agency(s),	Secretary of Education	1	1	Stable
Consumer	Individual, corporate and foundation donors	2,998	5,000	Increase
Employee	Paid and Volunteer Staff	766	800	Stable
Non-Profit Agency (Boards/Foundations),	Jamestown-Yorktown Foundation, Inc. Board of Directors	1	1	Stable
Non-Profit Agency (Boards/Foundations),	Jamestown-Yorktown Foundation Board of Trustees	1	1	Stable
Non-Profit Agency (Boards/Foundations),	Jamestown-Yorktown Educational Trust Board of Directors	1	1	Stable
Governor	Governor	1	1	Stable
General Assembly	General Assembly	1	1	Stable
State Agency(s),	DPB	1	1	Stable
State Agency(s),	BCOM	1	1	Stable
State Agency(s),	APA	1	1	Stable

Partners

Name	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 ("JYF"), an agency of the Commonwealth of Virginia. The Trust serves as a vehicle to support JYF's concession and enterprise operations.
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.

Agency Goals

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

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.

Associated State Goal

Education: Elevate the levels of educational preparedness and attainment of our citizens.

Associated Societal Indicator

Educational Attainment

Objectives

- » **Provide museum experience which results in at least a 95 percent good or excellent rating on our customer surveys**

Description

Provide museum experience which results in at least a 95 percent good or excellent rating on our customer surveys.

Objective Strategies

- Collaborate with public school systems and institutions of higher learning to enhance teacher education, as resources allow.
- Conduct primary research that will serve as the basis for all programs utilizing staff, interns, volunteers, and outside scholars as available.
- Conduct professional, informative orientations and tours of the museums or outdoor areas as resources allow.
- Coordinate and assess learning goals of education programs in relation to the Commonwealth's standards of learning.
- Implement board-approved plans.
- Maintain American Alliance of Museums (AAM) accreditation.
- Maintain cooperative education programs with other museums and nationally known historic sites as resources allow.
- Maintain current maritime outreach program levels.
- Ensure programming accommodations for diverse audiences (e.g., family, adult, special needs, educators, and other professionals), as resources allow.
- Manage and care for over 59,000 square feet of existing gallery exhibits and 6 outdoor living-history exhibit areas at Jamestown Settlement and the Yorktown Victory Center.
- Offer dynamic and engaging multi-year on-site gallery exhibit programs and outdoor living-history programs to visitors.
- Plan and fabricate changing exhibits at Jamestown Settlement and the future American Revolution Museum at Yorktown.
- Plan and fabricate new outdoor exhibits for the future American Revolution Museum at Yorktown.
- Plan and fabricate the indoor permanent exhibition for the future American Revolution Museum at Yorktown.
- Provide a robust customer research program that assesses the quality and effectiveness of the visitor experience.
- Provide museum guides and other aids to visitors to enhance way finding and access to galleries, outdoor interpretive areas and programs.
- Provide efficient, customer-friendly tour reservation service for groups utilizing JYF resources.
- Provide special educational and interpretive programming to the public, including hands-on presentation, special interpretive demonstrations, and weapon firing drills.
- Review and revise annually 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.
- 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.

Measures

- ◆ Percentage of visitors surveyed rating their experience good or excellent

» **Maintain outreach education programs to serve students in Virginia school districts**

Description

Maintain Outreach Education programs to serve students in Virginia school districts.

Objective Strategies

- Secure private contributions to support rising program costs.
- Implement board-approved program of statewide outreach program throughout Virginia.
- 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.
- Provide a maritime outreach program.

Measures

- ◆ Number of Outreach Education students served per Full Time Equivalent [F.T.E.] Instructor
- ◆ Number of students served by outreach education programs

» **Extend on-site structured education programs**

Description

Jamestown-Yorktown Foundation will serve the number of on-site structured education students.

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 service on an annual basis.
- Provide efficient, customer-friendly tour reservation service for groups utilizing JYF resources.
- Provide special educational and interpretive programming for public including hands-on presentation, special interpretive demonstrations, and weapon-firing drills.
- Obtain private contributions to offset rising program costs and subsidize decreasing public school participation due to budget reductions at the local school division level.

Measures

- ◆ Number of on-site structured education students served

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

Summary and Alignment

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

Associated State Goal

Natural Resources: Protect, conserve and wisely develop our natural, historical and cultural resources.

Associated Societal Indicator

Historic Resources

Objectives

» **Manage and care for the collections, and for borrowed artifacts according to collection guidelines, American Alliance of Museums (AAM) standards and artifact loan agreements**

Description

Manage and care for the collections, and for borrowed artifacts according to collection guidelines, American Alliance of Museums (AAM) standards and artifact loan agreements.

Objective Strategies

- 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.
- Utilize staff, interns, volunteers, and outside scholars to conduct this research.
- Monitor and record 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.
- Monitor and review collections storage conditions to ensure compliance with best practices standards, regularly update information catalogued in Vernon Collections Management system, review artifacts for conservation on a regular basis.
- Present lectures, staff training programs, and respond to research requests from public, donors, and various federal and state agencies.
- Produce a new, engaging introductory film for the future American Revolution Museum at Yorktown to provide visitors with an overview

of the American Revolution and prepare them for visiting the galleries and outdoor living history areas. Disassemble exhibitory at the existing facility and transfer artifacts to new museum facility at the appropriate construction phase.

- Review all aspects of collections management and policy to maintain AAM accreditation.
- Review display cases, lighting and HVAC systems to ensure safety for both artifacts and the public.
- Work effectively with major national and international lenders 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.

Measures

- **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.**

Summary and Alignment

As a result of its success in fulfilling its mission, JYF visitors spent an estimated \$108 million in the Historic Triangle in 2013 - on hotel rooms, meals and other commodities, and visiting other attractions during their visit.

Associated State Goal

Economy: Be a national leader in the preservation and enhancement of our economy.

Associated Societal Indicator

Business Climate

Objectives

- » **Generate admissions revenue through an effective marketing program**

Description

Generate admissions revenue through an effective marketing program.

Objective Strategies

- Actively manage admission rate pricing strategy and develop ticket products.
- Expand group sales and packaged tour growth.
- Implement media relations promotional efforts.
- Maximize online and off-site museum admission ticket sales.
- Operate in-house advertising agency and media placements.
- Promote sales of combination and co-op tickets.
- Actively manage customer expectations for the opening of the American Revolution Museum at Yorktown
- Effectively utilize Internet-based marketing strategies including JYF website, Facebook, Pinterest, Twitter, and digital advertising.

Measures

- ♦ Amount of paid advertising investment compared to nongeneral funds generated from admissions revenue

- **FACILITIES GOAL: Develop and maintain JYF buildings and grounds.**

Summary and Alignment

In order to fulfill its mission, JYF must have attractive, well designed facilities that adequately handle visitation demands, meet rigorous museum standards for the protection of the artifact collection, and ensure the comfort and safety of staff, visitors and artifacts.

Associated State Goal

Government and Citizens: Be recognized as the best-managed state in the nation.

Associated Societal Indicator

Government Operations

Objectives

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

Description

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

Objective Strategies

- Maintain buildings and expanded grounds efficiently in accordance with the highest standards.
- Maintain sufficient staffing and resources to meet compliance and accommodate service levels.
- Operate and maintain facilities during periods of peak visitation.
- Provide landscaping improvements to sustain view sheds, and thus improve the public product.
- Provide ongoing engineering/project supervision services in order to identify facilities issues, design improvements, develop detailed project costs, and ensure quality workmanship.

Measures

- ◆ Percentage of visitor survey complaints concerning the maintenance or operation of the Jamestown-Yorktown Foundation facilities

• **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.**

Summary and Alignment

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

Associated State Goal

Government and Citizens: Be recognized as the best-managed state in the nation.

Associated Societal Indicator

Government Operations

Objectives

» **Ensure that resources are used efficiently and programs are managed effectively, and in a manner consistent with applicable state and federal requirements**

Description

Ensure that resources are used efficiently and programs are managed effectively, and in a manner consistent with applicable state and federal requirements.

Objective Strategies

- 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 JYF and its affiliates.
- Attract and retain qualified paid and volunteer staff.
- Construct necessary facility improvements to ensure their continued ability to attract visitation and generate nongeneral fund revenue.
- Continue evaluation of JYF's management and operation systems.
- Develop national, regional and local awareness of JYF among potential visitors, the legislature, government agencies and local residents.
- Ensure effective board and committee meetings.
- Extend JYF educational mission through the sale of historically relevant and educational products.
- Implement the agency's capital improvement plan in conjunction with the provisions of the Commonwealth of Virginia Construction and Professional Services Manual.

- Incorporate Governor's initiatives as they relate to JYF in agency planning whenever feasible.
- 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.
- Maintain contact with central state agencies and federal and local agencies to maintain awareness of agency needs.
- 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 sufficient staffing and resources to meet compliance and service levels.
- Maintain the agency's state website in accordance with regulatory requirements.
- Maximize nongeneral fund income from gift shops and commissions.
- Monitor the need for board meetings or similar forums and convene such forums as needed.
- Promote adequate state government support for operating, capital and maintenance expenses.
- Promote dynamic working relationship between JYF board of trustees, the boards of its private affiliates, business leaders, and members of the Museum Programs Advisory Committee to utilize the leadership and vision of top museum, business and governmental leaders to best fulfill the agency's mission.
- Provide sufficient security to safeguard artifacts and provide public safety.
- Provide the fiscal, personnel and organizational resources, and structure necessary to support activities planned and implemented.
- Provide timely and relevant financial reporting to effectively manage JYF and private affiliate resources.
- Pursue technology investments and strategies that provide sufficient flexibility and support for marketing, retail, and private affiliate operations, while maximizing the efficiencies and security provided by the VITA network and policies.
- Review and revise strategic long-range plan with the board of trustees.
- Sustain current compliance levels with all state policies and regulations (e.g., financial, procurement, human resources, and capital outlay).
- Sustain current staff/board communications and working relationships.
- Sustain ongoing cooperation and explore future promotional and working opportunities with other agencies.
- Use agency assessment, performance, and budgeting data to evaluate agency resources.
- Utilize technology to communicate with the public and to operate in a more effective and efficient manner.
- Work with board committees to communicate agency resource and personnel needs and provide accurate timely information concerning JYF and private affiliate resource requirements.

Measures

- **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 earned income.**

Summary and Alignment

Nongeneral funds are essential for the operation of the JYF museums and an effective marketing initiative is required to generate admissions revenue so that the mission can be implemented.

Associated State Goal

Economy: Be a national leader in the preservation and enhancement of our economy.

Associated Societal Indicator

Business Climate

Objectives

» **Generate admissions revenue through an effective marketing program**

Description

Generate admissions revenue through an effective marketing program.

Objective Strategies

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- Actively manage customer expectations for the opening of the American Revolution Museum at Yorktown
- Effectively utilize Internet-based marketing strategies including JYF website, Facebook, Pinterest, Twitter, and digital advertising.

Measures

- ◆ Amount of paid advertising investment compared to nongeneral funds generated from admissions revenue

• **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.**

Summary and Alignment

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

Associated State Goal

Government and Citizens: Be recognized as the best-managed state in the nation.

Associated Societal Indicator

Government Operations

Objectives

» **Generate admissions revenue through an effective marketing program**

Description

Generate admissions revenue through an effective marketing program.

Objective Strategies

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Measures

- ◆ Amount of paid advertising investment compared to nongeneral funds generated from admissions revenue

» **Increase the number of donors making cash or in-kind donations**

Description

Financial support from a variety of sources is required in order to implement Jamestown-Yorktown Foundation's mission. Donations assist in this implementation.

Objective Strategies

- Increase opportunities for private sector funding support for the expansion of educational programs and projects.
- 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.

Measures

Major Products and Services

JYF is open daily year-round, except Christmas and New Year's Day and normal operating hours are from 9 a.m. to 5 p.m. with extended summer hours till 6:00 p.m. The museums feature films, gallery exhibits, hands-on activities and historical interpretation. Outdoor exhibits include: Powhatan Indian village, three 1607 replica ships, 1610-1614 re-created fort and self-guided riverfront discovery area at Jamestown Settlement and a Continental Army encampment and 1780s farm at the Yorktown Victory Center. JYF features a distinctive collection of more than 210,000 17th- and 18th-century artifacts and continues to acquire new artifacts for exhibit at both museums in support of its educational mission.

Structured education programs served 286,119 students in FY 2014, including 197,853 on site and 88,266 in outreach programs in 105 of Virginia's 132 school districts. More than 17 on-site programs for students and six outreach programs explore topics from Powhatan Indian World to Revolutionary Virginia. Summer programs include a Teacher's Institute and children's history camps. Supplemental curriculum materials, videos and essays are available on www.historyisfun.org.

The maritime program provides outreach opportunities in Virginia to conduct education programs and promote tourism and museum visitation. *Godspeed*, the Foundation's primary outreach sailing vessel, participated in Norfolk Harborfest in early June 2014 and in the Urbanna Oyster Festival in November 2014. In FY 2014, maritime outreach education programs served 2,803 visitors and 1,138 students in special hands-on programs aboard *Godspeed* at Henricus Historical Park, and in Onancock and Cape Charles on Virginia's Eastern Shore.

Special events, exhibitions and public lectures generate repeat visitation and foster donor support from awareness through media coverage. "Working and Racing on the Bay: The Chesapeake Log Canoe" special exhibition will be open September 2014 through September 2015, and features artifacts from the Mariners' Museum depicting the evolution of the dugout canoe through the centuries. Previous special exhibitions include a partnership with the Virginia Museum of Fine Arts. In 2013, 10 special events and theme months, and 5 public lectures were offered. Marketing programs and cooperative efforts with regional and state tourism entities encourage visitation, and generate and leverage revenue through advertising, sales, media relations and online efforts on www.historyisfun.org.

Performance Highlights

Customer Satisfaction: FY 2014 customer survey results indicated 99 percent "Good" or "Excellent" ratings.

Return on Advertising Investment: The FY 2014 ratio of admissions revenue to direct media advertising was \$8:\$1, based on \$5 million in revenues and \$607,616 in direct media expenditures.

Outreach Education Programs: Served 88,266 students in FY 2014 in 105 school divisions, 110 percent of annual goal but 16 percent more students than prior year.

On-site Education Programs: Served 197,853 participants in FY 2014, 101 percent of the annual goal and 6 percent more students than prior year.

Visitor Complaints: In FY 2014 fewer than 2 percent of customer surveys included complaints about facility operation or maintenance.

Staffing

Authorized Maximum Employment Level (MEL)	163
Salaried Employees	135
Wage Employees	255
Contracted Employees	0

Key Risk Factors

Revenues: The Williamsburg area has experienced a decline in tourism activity since Jamestown's 400th anniversary in 2007. (Consumer confidence and lower discretionary spending levels impact individual travel plans to visit museums and participate in fee-based programs.) The number of school division field trips is also in decline due to budget reductions and transportation costs. JYF faces competition in the Historic Triangle for visitor's time and money as well as for private donations.

Future American Revolution Museum at Yorktown: Unforeseen conditions could delay exhibit fabrication and outdoor-exhibit construction by the anticipated late 2016 opening. Existing programming will need to be modified to first handle diminished outdoor exhibits during the construction period and then expanded to handle the larger exhibit areas. During construction, the lack of museum galleries and reduced outdoor exhibit space may lead to reduced customer satisfaction.

Programming: JYF must ensure programming at both museums meets visitor expectations, with the most challenging task being the transition from the current Yorktown Victory Center to the new museum building, including expectations for engaging exhibit technology, Wi-Fi and internet based services. The Jamestown galleries exhibits will also be undergoing renovation and upgrades in preparation of the 2019 commemoration. State funding reductions have resulted in a diminished capacity to serve outreach students throughout the state. Outreach and on-site structured education program participation dropped five percent in 2012-2014 compared to the previous biennium. Despite this JYF will strive to maintain its position as the largest provider of structured museum education programs in Virginia by developing new programs related to STEM and distance learning in order to support core delivery of educational programming. Changing transportation costs, SOL requirements, and private donation levels also impact participation in structured education programs. (JYF has been charged by the General Assembly with the task of planning the 400th anniversary of the 1619 landmark events.) Reduced nongeneral fund revenues and state funding imposes greater challenges in planning activities for the commemoration.

Advertising: Funding level and programming for Williamsburg destination marketing is not competitive in the national tourism sector which impacts ability to attract visitors to the area and our museums potential market share. JYF museums visitation is directly correlated to the visitation levels of the Historic Triangle and Virginia.

Physical Plant: The tight maintenance budget threatens the visitor experience, exhibits, ships, artifacts and facilities. Additional equipment replacement will be deferred.

Workforce: In FY 2014, 55 percent of full-time employees meet retirement eligibility, with six percent eligible for full retirement, and another 49 percent eligible for a reduced benefit. Many of those eligible are upper level management. Current staffing levels leave JYF with little depth and the loss of key management could stifle the operations of the Foundation. JYF has continuous training needs due to high reliance on part-time staff, volunteers and the associated turnover. Turnover is primarily due to JYF's inability to offer competitive salaries with the local market and other state agencies. Reduced revenues result in the inability for JYF to maintain current staffing levels which comprise 68 percent of the budget. Limited funding exists to support employee recognition and retention programs. Shrinking administrative resources require efficiencies in order to meet expectations for human resources, finance, capital outlay, environmental regulation, and other state compliance requirements.

Environmental: Weather, facility conditions, and state/national security levels create safety concerns for visitors and employees, which may impact service levels and the quality of product provided.

Management Discussion

General Information About Ongoing Status of Agency

Fluctuating general fund and nongeneral fund sources combined are formidable challenges to maintain nongeneral fund revenue generation, market share and state compliance such as SWaM compliance, APA audit measures, IT information security, and maintaining internal controls.

Initiatives in FY 2015-2016: fine-tune operations to maintain program quality and meet fluctuating admissions revenue; continue structured on-site and outreach education programs; provide engaging special exhibits at both museums; maintain facilities and technology; meet state compliance objectives; manage the Yorktown museum construction project; and sustain critical NGF revenue streams.

Work continues to complete construction of the future American Revolution Museum at Yorktown. The new building received occupancy in March of 2015. Indoor exhibits and expanded outdoor exhibits will be complete by late 2016.

JYF will continue to explore visitor planning tools and educational offerings on www.historyisfun.org, including videos, curriculum materials; and continue technology improvements to ticketing and reservations systems and gift shop point-of-sale and inventory software.

JYF will continue to cost-effectively engage new customers and identify niche markets to increase ticket sales, online gift shop sales and donor contributions. Continue collaborative marketing efforts with local, regional and state tourism partners to leverage revenues and generate tourism to region and JYF museums. Begin building awareness of the future American Revolution Museum at Yorktown within tourism industry and among key donors.

JYF will assist with planning the 2019 400th anniversary of the 1619 landmark events in Virginia, the commemoration of the first representative legislative assembly, the arrival of the first documented Africans, the recruitment of women for colonization expansion and the observance of the first Thanksgiving.

Information Technology

Information Technology is integral to JYF's ability to achieve its operational mission. IT supports a blend of services provided by JYF IT staff, the VITA/NG partnership and as needed contracted services supporting five major applications and several commercial off-the-shelf (COTS) software applications. JYF-specific applications support business functions that generate approximately 50 percent of total revenues. Network infrastructure, data storage, desktop, laptop, and printer support through the VITA/NG partnership are the largest investments. Operational needs are impacted by response times, upgrade fees and exemption requests. Partnership fees totaled more than \$795,000 in FY 2014.

Adequate funding to provide seven day a week operational support for JYF specific technology remains a challenge. JYF has two full-time and two part-time staff to oversee ticketing and reservations, gift shop point-of-sale and inventory management, fundraising, collections management and accounting. A full-time electronics exhibit technician is responsible for audio-visual support and exhibit technology. Contracted services support JYF's website, www.historyisfun.org. Limited staff resources pose as risks for maintaining critical technical skills, keeping existing technology up-to-date, meeting IT security requirements including audits, and presenting IT solutions for business needs.

Network bandwidth is at capacity impacting system response times critical to point-of-sale applications for ticketing, reservations and gift shop sales. Additional bandwidth is required to meet growing business demand for Web-based educational, marketing content, web-based applications and increased data needs. Wireless access, currently not available, is becoming a required necessity to meet visitor expectations, for customer service and education initiatives. With the addition of web based technology at both museum sites, it is critical visitor expectations are managed for engaging exhibit technology,

The future American Revolution Museum at Yorktown is a significant IT investment (est. \$3.8 million; approximately 60 percent for audio visual and technology). New network infrastructure, data and telecommunication wiring, security systems, and IT project management are part of the scope of work and, when complete, will parallel with JS technology

Aging technology components at JS essential to museum operations include software, controllers, touch screens, projectors and monitors are scheduled for replacement. Obsolete security technology supporting the JS gallery exhibits, atrium exhibits and replica ships also must be replaced.

Future IT needs include assessment of the ticketing/reservation software installed in 2006 that combines ticketing, Web-based ticket sales, reservations, on-site group scheduling and invoicing data to accounting for future viability to meet JYF needs.

Estimate of Technology Funding Needs

Workforce Development

JYF's authorized MEL is 163 (98 GF classified; 65 NGF classified/exempt) with part-time positions varying seasonally. Positions are in five management divisions: Museum Operations & Education; Marketing & Retail Operations; Development; Executive Office; and Administration. Unlike many state agencies, JYF relies heavily on part-time staff to work many frontline jobs in education, visitor services, interpretation, and to support management divisions. In FY 2014, 321 part-time staff worked 173,891 hours (83 FTE positions) and comprised 66 percent of total paid staff. JYF has a strong volunteer program; with 525 volunteers worked that 57,688 service hours in 2013.

With the museums operating 363 days a year, staff work weekdays and weekends. Frontline staff work outdoors to serve visitors in all weather conditions. Hours worked by part-time staff are 100 percent dependent on revenue earned and may fluctuate dramatically. An estimated 29 percent of classified and exempt employee salaries are dependent on NGF revenue.

JYF tracks workforce retirement eligibility to ensure replacement or consistency of essential museum knowledge, skills and abilities. Currently six percent of employees are eligible for full retirement with another 49 percent eligible for a reduced retirement benefit, including staff in mid and upper level management. Existing staffing levels leave JYF with little depth and the loss of key management could stifle the operations of the Foundation. State budget reductions have provided challenges in retention, competitive salaries for existing staff and new hires, and monetary recognition of employees who exceed expectations. Other challenges include recruitment, staff retention, training, and expanding diversity. Maintaining volunteer programs presents similar challenges.

It is anticipated that there will be an increase in turnover rates. As resource levels change, JYF re-evaluates workloads, programs, organizational structure and processes to determine new strategies to achieve its goals and mission.

Physical Plant

A successful building program, funded from state and private investment, resulted in modern facilities and outdoor exhibit areas that meet operational and business needs. The new American Revolution Museum at Yorktown, a phased construction and exhibit fabrication program critical to JYF's education goals, will be complete by late 2016. The operational impact of larger facilities continues to be addressed. Proactive planning, preventive maintenance and capital improvement is key to maintain operations and future NGF revenue streams.

Maintenance and protection to keep facilities and exhibits operational 363 days a year is essential to ensure positive experiences by paid visitors; protection of artifacts from theft and environmental threats; ensure public safety; meet stringent security standards for loaned artifacts from national/international museums and maintain structural soundness. Reductions in routine maintenance, grounds keeping and housekeeping not only impact the appeal of JYF museums to visitors, but could result in accelerated deterioration of the physical plant.

Exhibits and facilities need to remain up-to-date with functioning technology to maintain the customer base and to attract new visitors that are critical to protecting tourism market share and producing NGF revenues. Funding is needed for technology-specific enhancements and changing technology affects the need for continued capital investment. New/improved technologies to support expanded marketing initiatives and create potential for increased efficiencies and revenue include lighting systems, video and sound systems, exhibits and security systems.

Supporting Documents

Title

File Type

Collections Management and Curatorial Services [14501]

Description of this Program / Service Area

This service area acquires and cares for 17th- 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.

Mission Alignment

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.

Products and Services

Description of Major Products and Services

This service area provides period artifacts that are cared for according to stringent standards, identifies potential artifact loans, implements loan agreements, and creates accurate, engaging historical exhibit themes and research-based content for the indoor and outdoor permanent and changing exhibits. JS has 30,000 square feet of permanent galleries plus 7,200 square feet of changing exhibit space. When completed, the permanent gallery at the future American Revolution Museum at Yorktown will have 22,328 square feet with 4,605 square feet of changing gallery. Permanent galleries typically are replaced every 10-15 years, while a changing gallery typically is 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 Alliance of Museums (AAM) and artifact loan agreement standards to ensure that artifacts will be equally available for future generations to see. Temperature, humidity and light levels must be closely monitored and actions taken to protect the artifacts if building systems are unable to meet standards. Curatorial Services will be significantly challenged in the 2014 - 16 biennium as the phased construction program for the future American Revolution Museum at Yorktown will require the artifacts to be removed from the existing museum prior to its demolition and transferred to the new facility.

Anticipated Changes

The agency is in the process of constructing the future American Revolution Museum at Yorktown. The new building will be utilized in 2015, open for operations in late 2016 and have an opening in 2017.

Factors Impacting

Acquiring artifacts to build the collection while providing a satisfactory visitor experience. Researching content for new galleries and introductory film for the future Yorktown museum with limited staff resources.

Financial Overview

Funding for Collections and Curatorial Services comes from general funds (19 percent) and from nongeneral funds (81 percent) - largely admissions revenue. Nongeneral 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. Some artifacts are also conserved utilizing maintenance reserve 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 nongeneral funds.

Biennial Budget

	2015 General Fund	2015 Nongeneral Fund	2016 General Fund	2016 Nongeneral Fund
Initial Appropriation for the Biennium	135,380	569,004	166,881	569,004
Changes to Initial Appropriation	0	0	181,500	0

Supporting Documents

Title	File Type
[Source of Authority Links]xxxx	Link

Education and Extension Services [14503]

Description of this Program / Service Area

Education and Extension Services includes six areas:

1. The Visitor Services office provides on-site 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 Structured 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.

Mission Alignment

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 provides the educational product for visitors; sells tickets to and assists visitors so they fully can experience the museums; and maintains ships and provides maritime outreach programs. Outreach Education and Special Services directly provides museum educational programs in classrooms throughout Virginia (including not only public schools, but private schools, home-schooled children, and out-of-state students) 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.

Products and Services

Description of Major Products and 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 on state and national basis so that teachers may better utilize the museum experiences and techniques 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: Analyzing visitor surveys, teacher evaluation forms and visitor comment cards and. Calculates JYF's economic impact and assists with visitation 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.

Anticipated Changes

JYF will strive to continue to be the largest provider of structured education in Virginia using both its formal outreach program as well as developing new and exciting programs particularly in the STEM areas of education. Significant emphasis will also be placed on the development of the distance learning program to support its core delivery.

JYF will develop and sustain its unique brand of delivering history through costumed interpretation and the built environment to include extensive expansion of its outdoor facilities at the future American Revolutionary Museum at Yorktown and changes within the main galleries at Jamestown. This will include the introduction of a artillery amphitheater, the relocation of its historic farm at the Yorktown site, and the expansion of the army encampment.

JYF will ramp up or down operations and may have to modify programming as visitation levels change.

As part of JYF's continued role managing accredited museums, an annual academic program of activities including lectures, seminars, web based content and an annual conference will be introduced linked to a changing special exhibition program on both sites.

JYF will continue to deliver its annual events program and the associated activity including its maritime program to ensure the Jamestown

Settlement and the Yorktown Victory Center continue to be the most engaging, educating and exciting visitor attractions in the region.

JYF must operate a much larger museum building, but did not receive additional operating funds for the incremental increase in operating costs. This will impact JYF's ability to achieve its goals in the 2014 - 2016 biennium. Short term measures to handle the immediate problem are not sustainable.

Factors Impacting

Group customers for outreach and on-site structured education programs are impacted by school budgets. JYF current and desired service levels can be affected by variable transportation costs, school budgets, SOL requirements and private donations.

Changes in visitor preferences and interest are monitored by customer research to identify changes in service levels and quality of product offered.

Weather, facility conditions and state/national security levels create onsite safety concerns for visitors and employees impacting service levels and the quality of product provided.

JYF makes training and volunteer opportunities available to all staff, paid and volunteer. Fluctuations in the budget impact the number of employees who require training and volunteers who can be recruited.

The 2011 successful re-accreditation by the AAM required 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 was exhaustive and demanding, but in addition to confirming the agency's planning processes and operational readiness, it further prepared JYF to plan service changes to ensure financial sustainability in a challenging tourism marketplace.

Financial Overview

Funding for Education and Extension Services come from general funds (51 percent) and from nongeneral funds (49 percent) - largely admissions revenue.

Biennial Budget

	2015 General Fund	2015 Nongeneral Fund	2016 General Fund	2016 Nongeneral Fund
Initial Appropriation for the Biennium	2,529,016	2,473,621	3,089,301	2,473,621
Changes to Initial Appropriation	0	0	0	0

Supporting Documents

Title	File Type
[Source of Authority Links]xxxx	Link

Operational and Support Services [14507]

Description of this Program / Service Area

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.

Mission Alignment

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.

Products and Services

Description of Major Products and 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 state agency and two 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 www.historyisfun.org website, 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.

Anticipated Changes

JYF must operate a much larger Yorktown Museum, but did not receive additional operating funds for the incremental increase in operating costs. This will impact JYF's ability to achieve its goals in the 2014 - 2016 biennium. Short term measures to handle the immediate problem are not sustainable.

Operate a new, enlarged museum at Yorktown

Planning will begin for the 400th commemoration of the 1619 landmark events.

Factors Impacting

Continuing demands and state compliance requirements will stretch the capabilities and capacities of Operational and Support Services to its limit. Retention of key employees and crucial support of needed resources will be vital to morale, productivity and quality service levels.

Financial Overview

Funding for Operational and Support Services comes from general funds (49 percent) and from nongeneral funds (51 percent)-largely admissions revenue.

Biennial Budget

	2015 General Fund	2015 Nongeneral Fund	2016 General Fund	2016 Nongeneral Fund

Initial Appropriation for the Biennium	4,743,871	4,896,403	4,770,947	4,908,114
Changes to Initial Appropriation	232,000	0	277,276	0

Supporting Documents

Title	File Type
[Source of Authority Links]xxxx	Link