

2016-18 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 the American Revolution Museum at Yorktown – 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 (51.6 percent) and nongeneral fund sources including admissions revenue (48.4 percent).

Biennial Budget

	2017 General Fund	2017 Nongeneral Fund	2018 General Fund	2018 Nongeneral Fund
Initial Appropriation for the Biennium	9,726,021	8,269,482	8,924,716	8,269,482
Changes to Initial Appropriation	-486,301	0	-7,689	111,226

(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

As the economy and tourism industry show improvement, the JYF museums will benefit. Post-recession declines that began in 2009, have reversed course in the last two years. Furthermore, as a result of per capita ticket price and management strategies, revenue growth has outpaced visitation growth.

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. There is a 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	567,094	700,000	Increase
Student	Virginia public school divisions (Outreach)	97	134	Increase
Student	The Foundation's museums	2	2	Stable
State Agency(s),	Secretary of Education	1	1	Stable
Consumer	Individual, corporate and foundation donors	2,928	3,500	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
Non-Profit Agency (Boards/Foundations),	Jamestown Commemorations Steering Committee	1	1	Stable
Non-Profit Agency (Boards/Foundations),	2019, Inc. Board of Directors	1	1	Stable
Governor	Governor	1	1	Stable
General Assembly	General Assembly	1	1	Stable
State Agency(s),	Jamestown-Yorktown Commemorations	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.
2019 Commemorations, Inc.	The 2019 Commemorations Inc. coordinates private fund development in support of 2019 commemoration programming. The 2019 Inc. is administered by a board of directors consisting of no more than ten members, including at least three, but no more than seven members of the 2019 Commemoration Steering Committee.

Agency Goals

- **EDUCATION GOAL: Present and interpret the collections and interpretive scope through educational programs, exhibits, publications, website content, 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 that results in at least a 95 percent good or excellent rating on agency customer surveys.

Description

Provide museum experience that results in at least a 95 percent good or excellent rating on agency 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 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 more than 67,000 square feet of existing gallery exhibits and 5 outdoor living-history exhibit areas at Jamestown Settlement and the American Revolution Museum at Yorktown.
- 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 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 exhibition plans, gallery planning process, and living-history area improvements.

Measures

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

» Grow outreach education programs to serve students in Virginia school districts

Description

Grow 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 in accordance with 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 cataloged 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.

- Develop and implement an exhibit refurbishment program at Jamestown in preparation for the 2019 commemoration.
- 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 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 \$96 million in the Historic Triangle in 2016 - 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.
- Promote the grand opening of the American Revolution Museum at Yorktown in the spring of 2017
- Effectively utilize Internet-based marketing strategies including marketing 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 strict humidity and temperature levels in galleries according to mandated museum 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 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, in a manner consistent with applicable state and federal requirements**

Description

Ensure 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 the agency's continued ability to attract visitation and generate nongeneral fund revenue.
- Continue evaluation of JYF's management and operation systems.
- Ensure effective board and committee meetings.
- Implement the agency's capital improvement plan in conjunction with the provisions of the Commonwealth of Virginia Construction and Professional Services Manual.
- Incorporate the Governor's initiatives as they relate to JYF in agency planning whenever feasible.
- Maintain an active membership roster and hold functions for The Council, an organizational affiliate consisting of former board members, to enlist members' assistance as long-term ambassadors of JYF 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 education and museum communities and within state government.

- Maintain sufficient staffing and resources to meet compliance and service levels.
- Maximize nongeneral fund income from gift shops and cafe commissions.
- Monitor the need for board meetings or similar forums and convene such forums as needed.
- Coordinate with sub agencies to support commemorative events in an efficient and effective manner.
- 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 staff and 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 and 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

- 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.
- Promote the grand opening of the American Revolution Museum at Yorktown in the spring of 2017
- Effectively utilize Internet-based marketing strategies including marketing 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

- Actively manage admission rate pricing strategy and develop ticket products.
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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. 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 newly expanded Continental Army encampment and 1780s farm at the American Revolution Museum at Yorktown. JYF features a distinctive collection of more than 210,300 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 271,211 students in FY 2016, including 198,783 on site and 72,428 in outreach programs in 97 of Virginia's 134 school districts. More than 25 on-site programs for students and six outreach programs explore topics from the Powhatan Indian World to Revolutionary Virginia. Summer programs include four different children's history camps. Supplemental curriculum materials, videos and essays are available on www.historyisfun.org.

The maritime program provides outreach opportunities in Virginia with the Jamestown Settlement ships to conduct education programs, create awareness for fundraising, and promote tourism and museum visitation. In calendar year 2016, *Godspeed*, the Foundation's primary outreach sailing vessel, participated in four events, including Norfolk's Harborfest in early June and the Urbanna Oyster Festival in early November. Maritime outreach education programs served 5,978 visitors and 606 students with special hands-on programs aboard *Godspeed* at all ports of call in 2016.

Special events, exhibitions and public lectures generate repeat visitation and foster donor support from awareness through media coverage. "AfterWARD" and "Pocahontas Reimagined" special exhibitions will be open in 2017. "AfterWARD" features four stories of American Revolution veterans and their impact on the new nation; "Pocahontas Reimagined" reviews how the iconic and often-misunderstood woman has been depicted over the centuries. In 2016, 10 special events, a conference, and five public lectures were offered. Marketing programs 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 2016 customer survey results indicated 99.3 percent "Good" or "Excellent" ratings.

Return on Advertising Investment: The FY 2016 ratio of admissions revenue to direct media advertising was \$10:\$1, based on \$5.4 million in revenues and \$545,628 in direct media expenditures.

Outreach Education Programs: Served 72,428 students in FY 2016 in 97 school divisions, 104 percent of annual goal but 291 less students than prior year.

On-site Education Programs: Served 198,783 participants in FY2016, 103 percent of the annual goal. Visitor Complaints: In FY 2016 fewer than 2.5 percent of customer surveys included complaints about facility operation or maintenance.

Staffing

Authorized Maximum Employment Level (MEL)	165
Salaried Employees	132
Wage Employees	255
Contracted Employees	0

Key Risk Factors

Revenues: "Tourism levels to the Williamsburg area directly impact visitation to the JYF museums. (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. JYF faces competition in the Historic Triangle for visitor's time and money as well as for private donations.

Programming: JYF must ensure programming at both museums meets visitor expectations. The most challenging task is fulfilling expectations for engaging exhibit technology, Wi-Fi and internet based services. The Jamestown Settlement gallery 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 two percent in 2014-16 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 delivery of core educational programming. Changing transportation costs, SOL requirements, and private donation levels also impact participation in structured education programs. In addition, the

General Assembly charged JYF to plan the 400th anniversary of land mark events occurring in Virginia in 1619. Limited nongeneral fund revenues and state funding imposes greater challenges on competitive positioning for JYF museums and the commemoration.

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

Physical Plant: The limited maintenance budget threatens the visitor experience, exhibits, ships, artifacts, and facilities.

Workforce: In FY2016, 40 percent of full-time employees are eligible for retirement, with eleven percent eligible for full retirement, and another 29 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 adversely impact agency operations. JYF has continuous training needs due to high reliance on part-time staff and volunteers, which has high associated turnover. Turnover is primarily due to JYF's inability to offer competitive compensation with the local market and other state agencies. Limited revenue impairs JYF's ability to maintain current staffing levels, with staffing costs comprising 67 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 regulations, 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 inhibit JYF's ability to generate nongeneral fund revenue, market share and meet state compliance requirements such as SWaM compliance, IT information security, and maintaining internal controls.

Initiatives in FY 2017-18: Fine-tune operations to maintain program quality and bolster fluctuating admissions revenue; grow structured on-site and outreach education programs; provide engaging special exhibits at both museums; adequately maintain facilities and technology; meet state compliance objectives; manage the Jamestown Settlement galley Refresh project; and sustain critical nongeneral fund revenue streams.

JYF will continue to explore visitor planning tools and educational offerings on www.historyisfun.org, including videos and curriculum material, and will 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 to seek out marketing arrangements with local, regional and state tourism partners to leverage revenues and generate tourism to region and JYF museums. It will continue building awareness of the new ARM@Y within the tourism industry and among key donors.

JYF will assist the sub-agency, Jamestown-Yorktown Commemorations, with planning the 2019 400th anniversary of the 1619 landmark events in Virginia; the commemoration of the first representative legislative assembly in the New World, the arrival of the first documented Africans in English North America, 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 JYF's largest IT investments. Operational needs are impacted by response times, upgrade fees and exemption requests. Partnership fees totaled more than \$918,000 in FY 2016.

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 systems. JYF's website, www.historyisfun.org is supported by contracted services. Two full time electronics exhibit technicians are responsible for audio-visual support and exhibit technology. With ongoing training constrained due to inadequate resources and an average tenure of less than two years for wage positions it is difficult to retain internal knowledge much less keep informed on newer technologies.

Network bandwidth has been increased to alleviate connectivity issues, which negatively impacted system response times critical to point-of-sale applications for ticketing, reservations and gift shop sales. Increased bandwidth provides capacity to eliminate local servers and utilize data centers for data storage; transition to voice-over-internet (VOIP) telecommunication options; and consider cloud based solutions. Relocation of servers to data centers addressed issues with aging equipment, and allowed for increased storage and greater physical security, it is more efficient.

The completion of the American Revolution Museum at Yorktown (\$3.8 million technology investment) is the impetus for additional audio visual support. The new museum utilizes technology to further engage visitors and to personalize their experience. Computer interactive programming and the experiential Siege Theater incorporating film, lighting and special effects require significant on-going support to remain operational 363 days a year. In addition to the exhibit technology at the ARM@Y, JS will be undergoing a gallery refreshment initiative to update the exhibit galleries, replace ten-year old technology, and incorporate new interactive programs, touch screens, and monitors.

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

Estimate of Technology Funding Needs

Workforce Development

JYF's authorized MEL is 165 (100 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 2016, 328 part-time staff worked 157,602 hours (76 FTE positions) and comprised 66 percent of total paid staff. JYF has a strong volunteer program; with 568 volunteers providing 65,796 service hours in 2016.

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. Wage staff and an estimated 30 percent of classified and exempt employee salaries are funded by NGF revenue.

JYF tracks workforce retirement eligibility to ensure replacement or consistency of essential museum knowledge, skills and abilities. Currently eleven percent of employees are eligible for full retirement with another 29 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.

JYF continues to manage challenging employee turnover rates. Further, 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 investments, has 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, was completed in spring 2017. The operational impact of larger facilities continues to be addressed. Proactive planning and preventive maintenance are key to maintaining inviting and functional facilities that will enhance operations and future NGF revenue streams.

Maintenance and protection is essential to:

- keep facilities and exhibits operational 363 days a year;
- ensure positive, visitor experiences;
- protect 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 overall 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 which are critical to protecting tourism market share and producing NGF revenues. Ongoing 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
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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.

Authority: Title 23, Chapter 23, Code of Virginia.

Products and Services

Description of Major Products and Services

This service area provides period artifacts that are maintained according to stringent standards. It 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. Jamestown Settlement has 30,000 square feet of permanent galleries plus 7,200 square feet of changing exhibit space. The permanent gallery at the future American Revolution Museum at Yorktown has 25,500 square feet with 4,600 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 are preserved 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.

Anticipated Changes

The agency recently completed construction of the American Revolution Museum at Yorktown, which celebrated its grand opening in 2017. Phase II of the Jamestown Settlement gallery refresh will begin during the summer of 2017.

Factors Impacting

Acquiring artifacts to continue building the collection while providing a satisfactory visitor experience.

Researching content for new galleries and exhibitions for the new American Revolution Museum at Yorktown and Jamestown Settlement with limited staff resources.

Financial Overview

Funding for Collections and Curatorial Services comes from general funds (11.1 percent) and from nongeneral funds (88.9 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. Other artifacts are 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

	2017 General Fund	2017 Nongeneral Fund	2018 General Fund	2018 Nongeneral Fund
Initial Appropriation for the Biennium	77,226	688,387	77,226	688,387
Changes to Initial Appropriation	0	0	0	-68,717

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 ten areas:

1. Visitor Services provides on-site ticket sales and customer service to visitors at two museums.
2. Interpretive Services provides costumed historical interpretation for visitors at two museums, as well as the production of reproduction historical costumes for interpretive staff to wear. This area plans public events.
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, adult groups, VIPs, and special interest groups.
4. Maritime Services 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. This area also manages exhibit audio visual technology.
6. Outreach Education provides classroom outreach programs to school areas across Virginia and develops online digital materials.
7. Group Reservations manages reservations for onsite, outreach and special programs.
8. Volunteer Services recruits and oversees the management of volunteers that support the agency.
9. Customer Research collects and interprets consumer and industry data for the support of management decisions.
10. Training and Development coordinates the development and delivery of foundation wide training.

Mission Alignment

Education and Extension Services provides the front-line programming and customer service for Jamestown Settlement and American Revolution Museum at Yorktown 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.

Authority: Title 23, Chapter 23, Code of Virginia.

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.

Provide advance and on-site ticket sales to both museums as well as combination tickets with 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: Analyzes visitor surveys, teacher evaluation forms and visitor comment cards. 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 continue to sustain and refine its unique brand of delivering history through costumed interpretation.

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 at both museums.

JYF will continue to deliver its annual events program and the associated activity including its maritime program to ensure the Jamestown Settlement and the American Revolution Museum at Yorktown continue to be the most engaging, educating and exciting visitor attractions in the region.

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 (56.0 percent) and from nongeneral funds (44.0 percent). - largely admissions revenue.

Biennial Budget

	2017 General Fund	2017 Nongeneral Fund	2018 General Fund	2018 Nongeneral Fund
Initial Appropriation for the Biennium	3,581,211	2,673,098	3,574,119	2,673,098
Changes to Initial Appropriation	-64,392	0	-81,209	68,717

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.

Authority: Title 23, Chapter 23, Code of Virginia.

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 & Retail Operations: 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 Jamestown Settlement and the American Revolution Museum at Yorktown.

Development: The Development Office provides fundraising support to JYF.

Human Resources: Provides human resource support to internal and external customers. Enforces state employment regulations, lists new positions, processes newly hired employees, advises on employee benefits, and records management.

Security and Safety Services: Provides a safe environment for visitors and staff; protects 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 new, enlarged museum at Yorktown.

With limited staffing, JYF will support the sub agency, Jamestown Yorktown Commemorations, in planning and implementing the 400th commemoration of key 1619 landmark events in Virginia.

JYF will continue to work toward integration of the CARDINAL and CARDINAL payroll systems as mandated by the state.

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 (51.6 percent) and from nongeneral funds (48.4 percent)-largely admissions revenue.

Biennial Budget

	2017 General Fund	2017 Nongeneral Fund	2018 General Fund	2018 Nongeneral Fund
Initial Appropriation for the Biennium	6,067,584	4,907,997	5,273,371	4,907,997
Changes to Initial Appropriation	-421,909	0	73,520	111,226

Supporting Documents

Title
[Source of Authority Links]xxxx

File Type
Link