Agency Strategic Plan

Jamestown-Yorktown Foundation

Agency Mission, Vision, and Values

Mission Statement:

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

Agency 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; and
- serves as a model workplace in terms of fairness, diversity and team spirit.

Agency Values:

- **Integrity**
- **Diversity**
- **Effective Communications**
- **Historical Accuracy**
- **High Quality of Customer Service**
- **Efficiency in Operations**
- **Creativity and Innovation**
- **Professionalism**
- **Fairness**
- **Openness**
- **Consistency of Effort**
- **Accountability**

Agency Executive Progress Report

Current Service Performance

The Jamestown-Yorktown Foundation (JYF) operates two living-history museums: Jamestown Settlement (JS) and the Yorktown Victory Center (YVC). It serves visitors to these museums, and provides structured education programs to students at both museums and outreach instruction to schoolchildren across the

Commonwealth. As a result, JYF is a major provider of public education services and an important tourism destination. Visitation at the museums totaled 641,642 in FY2005. As part of a comprehensive customer research program visitors complete comment cards during their visit, part-time research staff conduct structured surveys with randomly selected visitors, and teachers participating in structured education programs complete program evaluation forms. In FY2005, 99% of visitors and teachers surveyed rated their experiences with the museums/programs as "good" or "excellent," exceeding our DPB performance measure goal of 95%.

JYF is heavily dependent upon admissions revenue to support its operating budget, and paid visitation totaled 588,132 during FY2005. Approximately 42% of JYF's operating budget is non-general fund, primarily generated through admission ticket sales. Research indicates that "word-of-mouth" recommendations are a significant factor in a tourist's decision to visit JYF museums. Among the top reasons indicated by visitors to attend the museums were an interest in history, their children's education, or a vacation or business trip. Research shows that JYF is meeting these expectations.

Based on an economic model developed by the University of Virginia, the JYF economic impact to the Williamsburg (Historic Triangle) economy was $93 million in 2004.

During the 2004-2005 academic year, JYF provided hands-on programs to students at both museums and in outreach settings. Structured educational programs at the two museums served 206,253 participants, up 5% from the previous year. Outreach education programs were presented to 99,878 students in 117 of Virginia's 132 school districts. Educational programs are designed to address the Commonwealth's Standards of Learning (SOLs) for history and social studies.

The JYF artifact collection expanded by 288 artifacts to a total of 68,969 during FY2005. The collection consists of furniture, portraits, decorative items and archaeological artifacts. Recent additions include a 17th-century portrait of the Earl of Pembroke for JS and an 18th-century Eastern Shore clothes press for YVC.

Among the impacts on JYF performance were physical changes to the museums and support facilities, including the completion and opening of an expanded parking lot and entranceways at JS, the completion of a 40,000-square-foot permanent exhibition galleries wing at JS, and the completion of a 50,000-square-foot central support complex. The new JS permanent exhibits are currently being fabricated, and replacement exhibits for two galleries at YVC are currently under way. The new JS introductory film is nearing completion. Additional programming was provided at times last year to ensure visitor satisfaction during construction. Additional capital projects were under way or out to bid at year's end.

The JYF administrative team continues to seek to maximize its service performance and has met its goals overall with respect to the categories contained in Virginia Excels and Virginia Results. However, there are specific areas in which JYF is taking steps to improve performance, specifically in information technology planning, training and development, and internal controls.

Finally, JYF private affiliates raised significant private funds through both charitable donations and retail operations to leverage public dollars to support museum programs and facilities. Pledges to The Campaign for Jamestown Settlement met 50% of the total goal. Profits from three museum gift shops and the JS café also supported JYF operations.

Productivity

JYF operates two living-history museums and a successful outreach program, and provides support to Jamestown 2007 operations. JYF operates on a business model, examining its return on investment to measure its productivity. For example, in FY2005, the JYF obtained admissions income of $5 for every $1 expended on direct media advertising.

During FY2005, JYF initiated the "Barometer Project," designed to analyze 2007 commemoration staffing plans to ensure museum efficiency and effectiveness at various projected visitation levels, control costs, and ensure the flexibility to increase or decrease staffing levels as visitation patterns change. External reviewers with experience in this area will be asked to examine JYF staffing plans and provide suggestions for improvements, including the adequacy of the proposed management infrastructure to properly supervise activities during the commemoration period.

Acquisition of technology to reduce JYF operating costs has been a challenge. However, beginning this year, HVAC technicians are able to control temperature and humidity levels in our museums over the Internet, which makes it possible to manage several sites at the same time from a single location. Film projection systems in the museums are being updated, as is other audio-visual equipment and lighting to ensure both effectiveness of the equipment and lower operating costs.

JYF has acquired software and is ready to test some limited, low-cost improvements to accounting systems to increase productivity. It includes software developed by the Virginia Bar Association to both upload and download transactions from the Commonwealth Accounting and Reporting System (CARS), and private affiliate accounting software to streamline financial reporting timelines. Productivity will be significantly increased only through the acquisition of an Enterprise Resources Planning (ERP) system, currently being considered by the Virginia Information Technologies Agency under the Public/Private Educational Facilities and Infrastructure program (PPEA).

JYF has nearly 300 part-time employees who work on a seasonal basis depending on projected visitation. Human Resources is actively developing a database of part-time staff that would allow JYF to identify existing employees with specific skills to fill specialized staffing needs. This reduces the need to continually hire additional people to satisfy temporary workload needs and provides agency part-time staff with a more stable source of income, reducing part-time employee turnover. This program was helpful in FY2005 and is contributing to JYF's goal to reduce turnover and manage recruitment costs.

JYF also makes extensive use of volunteers. A total of 1,000 volunteers provided 37,050 hours of service to all areas of the JYF's programs and activities in 2004. This is an unusually high figure resulting from a sailing expedition and is expected to return to more normal levels in the coming year.

Among the factors that create employee turnover and resulting productivity losses are high levels of workforce competition in the Historic Triangle, JYF's high reliance on part-time staff, an inadequate recruitment budget, and limited dollars to adjust staff compensation to reflect the current market. JYF is working to secure funding to address these issues. JYF also provides an extensive training program that constantly incorporates the latest historical research and visitor/student/teacher evaluations to ensure that staff provides the highest quality services possible. If staff are retained and turnover is reduced, this effort is a proven investment in JYF services.

Major Initiatives and Related Progress

During FY2005, three major building projects were completed: The 50,000-square-foot central support complex, the 40,000-square-foot JS exhibition galleries wing (the fourth and final addition to the gallery complex), and the JS parking lots and entranceways project. The JS maintenance building is under renovation. At FY2005 year's end, the James Fort/Powhatan Indian village storm water and boardwalk project was out to bid, as was the JS sewer pump station. The JS riverfront amenities and shipwright building project will be out to bid by Fall 2005.

During FY2005, JS and YVC exhibit planning was well under way. A $9.7-million fabrication contract for the new JS permanent galleries was signed before year's end. Proposals to secure fabrication contracts for two YVC galleries will be issued in FY2006, and many artifact loan agreements have been secured for "The World of 1607" special exhibition at JS in 2007. Loaned artifacts are anticipated from the Sorbonne in France, the Ashmolean and the Royal Armouries in Great Britain, the State Museum of the Kremlin and the Historical Museum in Moscow, the Danish National Museum in Denmark, the Patrimonio Nacion in Spain, the Topkapi Palace Museum in Turkey, and other international museums. A new JS introductory film, which is being financed with private funds, is almost complete.

Two of JS's three ships are being replaced before the 2007 commemoration. Construction continues on a new Godspeed, and soon bids will be received for a new Discovery. Both of the new reproduction vessels will be more historically accurate than the current replica ships, based on recent research developments.

JYF also seeks to expand its on-site and outreach structured education programs to serve all school districts in the Commonwealth, as well as use private funds to expand programming to selected sites outside the Commonwealth.

JYF will have to replace its ticketing/reservation system by 2008 when the current vendor will discontinue software support. A consultant, obtained through a VITA contract, reviewed JYF's needs, current software, and business processes last year, and surveyed the software market to identify strengths and weaknesses of at least four potential vendors for a new system. JYF is currently taking steps to issue an RFP during FY2006 in an effort to have the new system operational before the 2007 commemoration.

Virginia Ranking and Trends

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

Customer Trends and Coverage

With respect to museum visitation, slightly over 75% of individual visitors to the JYF's museums come from out-of-state. States with the highest number of visitors include Pennsylvania, New York, New Jersey, Ohio, Maryland, California, Florida, Illinois and North Carolina. Both museums rank in the top 20 of Virginia tourist destinations.

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

Future Direction, Expectations, and Priorities

During the 2006-2008 biennium, JYF expects to accomplish the following priorities:

- Board of Trustees will enhance governance systems through the strategic long-range planning process.

- Complete the JS building program envisioned in the Comprehensive Facilities Master Plan in time for the 2007 commemoration.

- Open the new JS permanent exhibition galleries, as well as the special exhibition, "The World of 1607," which will be on display for one year during the commemorative period.

- Complete YVC renovations and re-open two galleries in time for the 225th commemoration in October 2006 of the Siege of Yorktown.

- Provide special programming at both museums during the commemoration period in order to manage the anticipated surge of visitation and to meet visitor expectations.

- Replace the current ticketing software and hardware that will no longer be supported by the vendor sometime in 2008.

- Provide an off-site interpretive team to provide pageantry and educational services during the Godspeed commemorative sail and at special commemorative events across the Commonwealth.

- Successfully operate a greatly expanded physical plant.

- Ensure sufficient front-line staff to meet visitor expectations for their museum experience.

- Host special commemorative events.

- Meet or exceed all of the state's financial, human resources, information technology, procurement and other administrative compliance requirements.

- Increase the diversity of our workforce.

- Provide reasonable incentives to retain key temporary front-line staff through the commemorative period.

- Increase on-site structured education program participation by 24,000 students.

- Increase outreach education program student participation by 42,000 students, and conduct the programs in 100% of the Commonwealth's school districts.

- Meet or exceed the requirements for artifact loan agreements so that artifacts from international museums will be made available for display at JS during 2007.

- Acquire key artifacts that the board has identified to enhance the quality of exhibits at both museums.

- Ensure that all exhibits are well maintained and necessary repairs are made in a timely fashion.

- Maintain and refresh JYF's investment in technology infrastructure and capabilities.

- Ensure sufficient public access to JS ships and meet Board of Trustees expectations for JYF's sailing program.

- Wisely spend marketing funds to maximize the return on investment for every advertising dollar spent.

- Ensure superior safety and security for staff, the public, and our property.

- Raise private funds to assist with programming and exhibit enhancements.

- Maximize the net income from retail operations in order to increase non-general fund support for JYF programs.

- Enhance governance systems to ensure state compliance requirements are met.

- Successfully train, recruit and retain key staff through the commemoration.

- Utilize technology to create effective programs and services and to improve the management of JYF museums.

- Recruit, retain and effectively utilize volunteers to meet agency objectives.

Impediments

Examples of impediments and/or potential impediments JYF faces in satisfying visitor expectations and achieving its mission are as follows:

- Insufficient destination advertising for the Williamsburg area compared to that being successfully purchased by competing travel destinations.

- Reduced cooperative advertising programs in the Williamsburg area.

- Time poverty for visitors that come to Williamsburg (the average visit is 2.5 days instead of 3.7 days visitors spent in 1995).

- Competitive employment market in Historic Triangle that makes recruiting and/or retaining volunteers and additional front-line staff difficult, as JYF faces expected higher-than-normal employee turnover during the commemorative period.

- Unexpected exhibit fabrication or construction project issues, such as unseasonably wet weather, that could delay a fabricator or contractor from project completion by the due date. Also, higher-than-average price increases for construction materials or contractors, given the huge amount of ongoing construction in the Historic Triangle and adjacent metropolitan areas.

- Inability to perform all construction before and/or after hours of visitation and still meet deadlines.

- Significant competition for private donations.

- Inability to control all variables and to predict precisely the visitation levels that will occur during the 2007 commemoration.

Agency Background Information

Statutory Authority

§ 23-287 of the Code of Virginia establishes the Jamestown-Yorktown Foundation as an educational institution to administer certain historical museums and related programs. JYF is charged to further an appreciation of the contributions of the first permanent English-speaking settlers and their American Indian neighbors of Virginia and the United States to the building of our Commonwealth and nation, to commemorate the winning of

American independence on the battlefield at Yorktown, and to enhance our understanding of the creation of the United States Constitution and Bill of Rights, including Virginia's role in shaping the fundamental principles of the American constitutional system.

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

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

Customer Base:

Customer Description	Served	Potential
General public visitors	640,000	1,000,000
Private and corporate donors	2,057	5,000
Virginia public school divisions	117	132

Anticipated Changes in Agency Customer Base:

An increase in visitation is anticipated during the Jamestown 400th Anniversary Commemoration and the 225th Anniversary of the Siege of Yorktown in the 2006 - 2008 biennium.

As new or reinterpreted facts, artifacts and theories evolve, JYF efforts to accurately reflect the presentation of new information in museum exhibits and by museum services staff must change, as well.

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

While the number of Virginia school districts is relatively stable, the student population continues to escalate with the general demographics of the Commonwealth. This results in unsatisfied demand generated from school districts that do not currently participate in museum programs, the increased number of students in real terms and the constant turnover of grade, middle and high school student populations in districts already served. Through the potential of existing and emerging technology, JYF has the opportunity to extend products and services virtually to an almost limitless world-wide customer base.

Agency Partners:

Colonial National Park- Historic Jamestowne

Joint destination messaging and promotion, joint special events, cooperative opportunities, joint ticketing, training and historical research to promote visitation and tourism growth.

Colonial Williamsburg Foundation; Busch Gardens; Water Country USA

Joint promotional and advertising efforts to maintain and stimulate visitation, economic tourism growth and non-general revenues.

Jamestown-Yorktown Educational Trust

The Jamestown-Yorktown Educational Trust provides financial support through it gift shop and food service operations.

Jamestown-Yorktown Foundation, Inc.

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

Virginia Tourism Authority

Augments promotional and advertising efforts to maintain and stimulate visitation, economic tourism growth and non-general revenues for Jamestown 400th Anniversary Commemoration.

Williamsburg Area Convention and Visitors Bureau; Williamsburg Hotel/Motel Association

Joint promotional and advertising efforts to maintain and stimulate visitation, economic tourism growth and non-general revenues.

Agency Products and Services:

Current Products and Services

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

Factors Impacting Agency Products and Services

- Use of non-general funds for replacement of the ticketing system that otherwise would be used for programming.
- Highly competitive labor market in the Historic Triangle.
- Staff turnover issues associated with a high reliance on part-time staff.
- Inadequate overall investment in advertising Williamsburg as a tourism destination compared to what is being spent by competing destinations.
- Changing technology infrastructure and application needs.
- Increasing population of school children to be served with educational programming.
- Special commemoration activities expected by state leaders and the public in 2007.
- Maintaining and operating an expanded physical plant.
- Managing safety and security with the expected surge of visitation and increased after-hour special events.

Anticipated Changes in Agency Products and Services

During the upcoming biennium, JYF will continue investing time, people and other resources in the museums' product and services. For example, JYF is developing the concept and programmatic elements of a virtual "electronic field trip" to reach hundreds or even thousands of students and visitors who might otherwise not have the opportunity to share in the museums' on-site programs. JYF plans to implement a new reservation ticketing system to help manage museum capacity in a visitor-friendly way to make a visit much more enjoyable while optimally utilizing the museum facilities. The 2006 Godspeed Sail will not only bring national attention to this historically significant Jamestown commemoration, but stimulate museum visitation and donations.

Agency Financial Resources Summary:

JYF funding of the base budget comes from general funds 58% and non-general fund sources including admissions revenue 42%.

	Fiscal Year 2007		Fiscal Year 2008	
	General Fund	Nongeneral Fund	General Fund	Nongeneral Fund
Base Budget	$8,876,696	$6,305,526	$8,876,696	$6,305,526
Changes To Base	$2,685,779	$1,058,678	$1,657,189	$1,555,419
AGENCY TOTAL	**$11,562,475**	**$7,364,204**	**$10,533,885**	**$7,860,945**

Agency Human Resources Summary:

Human Resources Overview

As of July 1, 2005, JYF has an authorized maximum equivalency level (MEL) of 211. Ten of the 211 positions are of limited duration approved specifically to support the 2007 commemoration. This MEL level includes 37 new positions in FY2006 which are currently being recruited.

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

Thirty-five percent of current on-board employees (168) are full-time, salaried staff (classified and excepted). Salaried positions include interpretive staff, maintenance staff, curatorial and exhibit services, as well as management, supervisory, strategic, or administrative positions.

The JYF staff configuration differs from many state organizations in that the 65% of staff currently employed (311 employees, 90 FTE's) are paid hourly and work no more than 1500 hours per year. For the most part, hourly positions are front-line, working directly with customers by providing education tours, gift shop services, visitor services, outreach instruction and costumed interpretation. Other hourly positions support finance, development, facilities, marketing and the executive administrative offices.

JYF museums are open 363 days per year, closing only on Christmas and New Year's Day, therefore many of the hourly and classified positions must work weekdays and weekends. Additionally, many staff must work outside dealing with all types of weather conditions. Hours worked by part-time, hourly staff are 100% dependent on revenue earned and therefore may fluctuate dramatically. Approximately 35% of salaries for classified and excepted employees are dependent on non-general fund revenue.

Full-Time Equivalent (FTE) Position Summary

Effective Date: 7/1/2005

Total Authorized Position level	211
Vacant Positions	43
Non-Classified (Filled)	0
Full-Time Classified (Filled)	168
Part-Time Classified (Filled)	0
Faculty (Filled)	0
Wage	90
Contract Employees	4
Total Human Resource Level	**262**

Factors Impacting Human Resources

Recruitment and retention of a highly competent workforce leading into and during 2007: Issues to be addressed include how to remain competitive in a tight employment market, and development of strategies to assure that dedicated staff and volunteers are not burned-out during this anticipated high-workload/high-volume visitation period.

Recruitment and retention of a diverse workforce: Issues to be addressed include expanding the diversity of the workforce by developing strategies to draw a diverse candidate pool from cities and counties surrounding Williamsburg and Yorktown. This will be especially challenging when confronted with rising gas prices and limited hours for part-time employees.

Unexpected increases and decreases in visitation and non-general fund revenues: The 2007 commemoration brings many unknowns that impact the level of non-general fund resources that may be required over the next couple of years. Challenges include how best to quickly increase or decrease staff levels based on visitation levels during the commemoration, and how to decrease resource levels with minimal impact if visitation levels decrease dramatically post-commemoration. Specialized training, increased paperwork, office equipment and facilities are related issues that must be addressed.

Anticipated Changes in Human Resources

Human resource levels have been increasing steadily over the past few years especially with the 2007 commemoration on the horizon. A number of human resources issues may arise if projected visitation levels do not materialize leading to 2007, or if workload needs drop dramatically post-commemoration. These issues may include maintaining staff morale, re-training, severance packages, reorganizations, position reclassifications, and employee assistance.

Projected visitation levels may materialize or exceed expectations in 2007 and beyond creating new and increasing permanent workload demands. A different set of human resource issues will arise including resource strategies for meeting workload expectations, justifications, and negotiations for procuring additional staff (increased FTEs), increased recruitment efforts, and human resource program expansions.

Agency Information Technology Summary:

Current State / Issues

JYF primarily relies on off-the-shelf application packages for point-of-sale ticketing, gift shop sales and inventory, fundraising, collections management. These applications must be maintained and upgraded periodically to provide JYF with the effective tools to manage business processes that generate 42% of the its operating revenues. In FY2006, JYF will hire a database administrator to manage these multiple databases, oversee report writing and maintain software upgrades.

The major issue confronting JYF is the replacement of the ticketing/reservation system. JYF is currently using a terminal-based ticketing software package installed in 1999 to support operations (i.e., reservations, on-site education group scheduling, off-site outreach education scheduling, invoicing, etc.). The software provider has indicated that it will phase out support for its terminal-based software by 2008 which has placed JYF in immediate need for a new software solution as it prepares for the 2007 commemoration.

In FY2005, JYF hired a consultant to review its needs, current software and business processes and identified the strengths and weaknesses of four potential replacement vendors. JYF has identified non-general funds in its base operating budget to proceed with this project in FY2006. The project was approved by the IT Investment Board for the 2004-2006 biennium.

The construction of new JS museum facilities has necessitated reconfiguration of the network infrastructure. In addition, previously grandfathered demarcation sites for telephone service have been demolished, requiring new wiring and planning for telecommunication infrastructure.

Over the past two years, JYF has made significant progress in addressing needed changes to the IT infrastructure. Some aging servers have been replaced and storage capacity upgraded but others servers need to be replaced. Improved connectivity between JYF's three geographic sites has been implemented and bandwidth increased. However, continued high usage between the three sites, and the Jamestown 2007 site, may require additional bandwidth to maintain acceptable connectivity speeds.

Recent applications added to the network include software to monitor and control energy usage in the JYF's facilities and tracking software for work orders. JYF is also implementing the use of accounting software for state expenditures and working on automating batch processing with CARS for upload/download of transaction data.

Factor Impacting Information Technology

The most critical issue is the replacement of the ticketing/reservation system. With the anticipated increase in visitation in 2007, it is crucial that this major system replacement be completed in FY2006.

Changes resulting from VITA transformation activities will impact the support and operations of the network infrastructure. Additional funding received in the FY2006 base budget will assist in offsetting increased costs related to the proposed shared services rate structure. JYF museums operate 363 days a year so it is critical that network support and infrastructure is supported and maintained 24 hours a day, 7 days a week.

JYF would like to have a three-year refreshment cycle for servers and personal computers and to minimize the number of users on different operating platforms. Currently, it needs to upgrade users to Windows XP and Office 2003.

Improving connectivity between sites remains a challenge due to limited services available. Transparent light service is not available from the vendor due to JYF facilities' physical distance from the vendor's central office. Construction funds to expand the service to JYF are limited and currently there are no other customers requesting the service.

Increased technology-driven exhibits in the new JS permanent galleries will require additional increases to the network. Use of closed-circuit television monitoring for security is also placing more strain on the existing bandwidth.

Anticipated Changes / Desired State

The replacement ticketing software will implement a commercial off-the-shelf technology package to meet the JYF's ticketing, scheduling and resource management needs. The new software solution will replace the existing terminal based system and offer new functionality (timed ticketing, web-based ticketing, kiosks, bar coding, etc.) that will improve operational efficiency and be critical in supporting the increased number of visitors anticipated for the Jamestown 400th anniversary commemoration. Expected benefits include improved system administration, greater focus on customer experience, ability to customized confirmation and invoice content and format and better management of JYF resources.

To integrate operations for JYF and its private affiliates, JYF would like to utilize an integrated financial accounting and management planning system. This system would address issues that arise from utilization of stand-alone state applications such as CARS, CIPPS, eVA and PMIS. In addition, JYF would be able to use such a system to integrate financial activity from its private affiliates to develop comprehensive management reports. It would like to begin planning for implementation of a system after the 2007 commemoration period. The Enterprise Application PPEA currently under evaluation by VITA may impact this project.

Working with VITA, JYF would like to upgrade existing systems to Windows XP and Office 2003. Upgrades to the e-mail system are also required. Upgrades to basic software and hardware maintenance contracts will be used to reduce workload on IT staff. Additional bandwidth will be acquired to maintain necessary speed and data transfer between sites.

Agency Information Technology Investments:

	Cost-Fiscal Year 2007		Cost-Fiscal Year 2008	
	General Fund	Nongeneral Fund	General Fund	Nongeneral Fund
Major IT Projects	$79,568	$90,000	$0	$0
Non-Major IT Projects	$121,523	$0	$57,782	$0
Major IT Procurements	$0	$0	$0	$0
Non-Major IT Procurements	$25,000	$0	$25,000	$0
Totals	**$226,091**	**$90,000**	**$82,782**	**$0**

Agency Capital Investments Summary:

Current State / Issues

Physical plant: Our three principle locations - Jamestown Settlement, Yorktown Victory Center and Central Support Complex are/or will be relatively new or renovated facilities. In order to protect these assets and extend their economic and practical operating life, our major and routine maintenance requirements have increased and will continue to do so. Maintaining visitor-sensitive areas such as rest rooms in a clean operating condition is vital to visitors' overall positive experience. Employee attitudes and moral is also affected by the conditions in which they work. All levels of professional and staff specialized training is necessary to properly utilize and maintain these assets.

Owned or leased Vehicles and Mobile Equipment: Inadequate to provide the necessary support for agency activities such as outreach trips to served school divisions, necessary maintenance and upkeep of buildings, parking lots or grounds, or conducting agency business generally.

Security and safety equipment: Emergency generators, fire prevention and suppression equipment, security warning and communication systems, and safety warning equipment are generally in need of upgrade to provide rapid response and effective backup system to protect employees, visitor and JYF assets.

Factors Impacting Capital Investments

As the capital investments of JYF's aggressive Facilities Master Plan are constructed and made operational, they will require increased general operating budgets levels and maintenance reserve in order to maintain quality facilities.

Museums by their nature must continue to draw investment in order to provide up-to date changing and revitalized permanent exhibit galleries to attract new and returning visitors.

Technology is an investment which must be ongoing as existing assets are no longer supported or become inadequate for expanded business applications. A program of annual funding specific to technology is required.

Particularly important to JYF educational goals is an ongoing vehicle replacement program to support current service levels to the Commonwealth's school divisions and additional vehicles are necessary to meet JYF objectives to service all divisions requesting outreach programs. The authority and funding to lease and or purchase the necessary vehicular capacity is needed.

Capital Investment Alignment

JYF capital investment has been the lifeblood of its ability to provide any volume of reasonable projected customers with quality products and services mandated by the Commonwealth's General Assembly. It underscores JYF's mission to educate, promote awareness and understanding of Virginia's role in the creation of the United States, and brings to life through facilities, artifacts and interpretation a meaningful representation of 17th-century Jamestown and 18th-century Yorktown.

Agency Goals

Goal #1:

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

Goal Summary and Alignment:

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

Statewide Goals Supported by Goal #1

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

Goal #2:

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

Goal Summary and Alignment:

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

Statewide Goals Supported by Goal #2

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

Goal #3:

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

Goal Summary and Alignment:

As a result of its success in fulfilling its mission, JYF has an estimated $93 million impact on the Historic Triangle - as visitors rent rooms, buy meals and other commodities, and visit other attractions during their visit.

Statewide Goals Supported by Goal #3

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

Goal #4:

FACILITIES GOAL: Develop and maintain JYF buildings and grounds.

Goal Summary and Alignment:

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

Statewide Goals Supported by Goal #4

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

Goal #5:

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

Goal Summary and Alignment:

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

Statewide Goals Supported by Goal #5

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

Goal #6:

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

Goal Summary and Alignment:

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

Statewide Goals Supported by Goal #6

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

Service Area Plan

Jamestown-Yorktown Foundation

Operational and Support Services (14507)

Service Area Background Information

Service Area Description

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

Service Area Alignment to Mission

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

Service Area Statutory Authority

§ 23-287 of the Code of Virginia establishes JYF as an educational institution to administer certain historical museums and related programs. It is charged to further an appreciation of the contributions of the first permanent English-speaking settlers and their American Indian neighbors of Virginia and the United States to the building of our Commonwealth and nation, to commemorate the winning of American independence on the battlefield at Yorktown, and to enhance our understanding of the making of the United States Constitution and Bill of Rights, including Virginia's role in shaping the fundamental principles of the American constitutional system.

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

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

Service Area Customer Base

Customer(s)	Served	Potential
APA	1	1
BCOM	1	1
Department of Education	1	1
DPB	1	1
General Assembly	1	1
Private and corporate donors	2,057	5,000
The Foundation's museums	2	2

Service Area Partners

Jamestown-Yorktown Foundation, Inc.

JYF, Inc. coordinates private fund development in support of JYF programs. JYF, Inc., through receipt of private donations and gifts, expends funds to benefit the operations and educational programs of the JYF museums.

Service Area Plan

Jamestown-Yorktown Foundation

Operational and Support Services (14507)

Service Area 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 two state and agencies and three private affiliates that clearly delineates each entity's financial support. Prepares accurate, timely financial reporting for grants and restricted gift donations. Prepares monthly report on departmental activities to Deputy Executive Director of Administration for inclusion in board reports.
- Facilities and Maintenance: Provides the management and delivery of JYF's capital program and maintenance of its facilities and equipment.
- Marketing and Retail Operations: Department designs and implements marketing programs, including advertising, media relations services, sales and promotions, on-site advertising agency and graphic design and the historyisfun.org Web site, and manages on-site retail and food services to generate paid admissions to JS and the YVC.
- Development: The Development Office provides full strategic and operational support to fund development efforts of JYF and its non-profit affiliate, JYF, Inc.
- Human Resources: Provides human resource support to internal and external customers. Enforcement of state employment regulations, listing of new positions, processing of newly hired employees, employee benefit advisement, and records management.
- Security and Safety Services: Provides a safe environment for visitors and staff, and to protect the collections, facilities and other physical assets of JYF against loss from fire, theft and willful destruction.
- Executive and Deputy Executive Offices: Provides the leadership and management of JYF.
- Information Technology: An organizational framework that supports the business objectives of JYF through hardware and software standardization a help desk, upgrades and maintenance of equipment.

Factors Impacting Service Area Products and Services

The growing demands of the commemoration will stretch the capabilities and capacities of Operational and Support Services to its limit during the 2006 - 2008 biennium. Retention of key employees and crucial support of needed resources will be vital to moral, productivity and quality service levels.

Anticipated Changes To Service Area Products and Services

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

Service Area Plan

Jamestown-Yorktown Foundation

Operational and Support Services (14507)

Service Area Financial Summary

Funding for Operational and Support Services comes from general funds (59%) and from non-general funds (41%)-largely admissions revenue.

	Fiscal Year 2007		Fiscal Year 2008	
	General Fund	Nongeneral Fund	General Fund	Nongeneral Fund
Base Budget	$5,669,897	$3,880,164	$5,669,897	$3,880,164
Changes To Base	$1,556,107	$405,841	$1,123,955	$861,947
SERVICE AREA TOTAL	**$7,226,004**	**$4,286,005**	**$6,793,852**	**$4,742,111**

Service Area Objectives, Measures, and Strategies

Objective 14507.01

Generate admissions revenue through an effective marketing program.

This Objective Supports the Following Agency Goals:

- 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.

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

This Objective Has The Following Measure(s):

- **Measure 14507.01.00**

  Rate of Return - Direct Media advertising

  Measure Type: Input **Measure Frequency:** Annually

  Measure Baseline: $4.78 to $1 in FY2005.

  Measure Target: A ratio of $5 to $1.

  Measure Source and Calculation:
  The paid admission revenue divided by the actual direct media advertising expense.

Objective 14507.01 Has the Following Strategies:

- Actively manage admission rate pricing strategy to maximize per capita sales while maintaining paid visitation base, "best possible" quality standards and excellent customer evaluations for both group and individual visitation. Special attention will be paid to the impact of the economy on the consumer, permanent gallery closure, construction impacts and multiple improvements throughout the entire JS site. Facilities planned for completion by 2007.
- Expand coverage of JYF museums, education programs, exhibits, sailing program, special events, new facilities and capital campaign through media relations efforts. Additional efforts to maximize 2007-related opportunities will require additional staff and budget resources. Maintain at least 600 known print placements annually.
- Expand group sales and packaged tours growth, which accounts for 15.5% of total paid admissions, through proven sales strategies in the well-defined group tour and student tour markets. Promote special events/offerings that will occur in 2007 in all existing sales efforts. Expand sales reach and trade show participation in support of 2007 if additional staff and budget resources become available.
- Manage off-site museum admission ticket sales, distribution of discount admission coupons and distribution of JYF promotional materials to 140 off-site ticket sales locations.
- Promote sale of combination and co-op tickets, at front desk of museums, and actively include in all advertising efforts with overall goal to increase sales annually. These tickets account for over 50% of total paid admissions and 85% of YVC paid admissions.

Objective 14507.02

JYF will meet or exceed the state compliance standards established under the Virginia Excels program.

This Objective Supports the Following Agency Goals:

- 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.

This Objective Has The Following Measure(s):

- **Measure 14507.02.00**

  Virginia Excels Requirements

  Measure Type: Outcome **Measure Frequency:** Annually

  Measure Baseline: 83% in FY2005.

  Measure Target: 100%

  Measure Source and Calculation:
  The number of "meets requirements" designations of all the requirements specified in Virginia Excels.

Objective 14507.02 Has the Following Strategies:

- Maintain accreditation by the American Association of Museums.
- Promote working relationship between JYF and its private affiliates.
- Continue evaluation and consolidation of JYF's management and operation systems.
- Ensure qualified paid and volunteer staff are attracted and retained.
- Ensure that the agency adheres to all state and other government policies and regulations (e.g., financial, procurement, human resources, and capital outlay).
- Every other year, review and revise with the Board of Trustees the Strategic Long-Range Plan.
- Ensure effective board and committee meetings.
- Enhance communications and working relationships between staff and boards.
- Provide the fiscal, personnel and organizational resources and structure necessary to support activities planned and implemented during the 2006 - 2008 biennium.
- Provide timely and relevant financial information to effectively manage JYF and private affiliate resources.
- Intensify efforts beyond that permitted under the base budget to attract and retain qualified volunteers and staff, as resources allow.
- Significantly increase JYF's competitiveness to attract and retain qualified personnel in keeping with state policy.
- Make greater use of technology to communicate with the public and to operate in a more effective and efficient manner.
- Maintain sufficient staffing and resources to meet compliance and service levels as agency expands while operating in an effective and efficient manner.

- Promote adequate state government support for operating, capital and maintenance expenses.
- 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 the JYF's private affiliate.
- Increase opportunities for private sector funding support for the expansion of educational programs and projects.
- Maximize non-general fund income from gift shops and commissions.
- Develop national, regional and local awareness of JYF among potential visitors, the legislature, government agencies and local residents.
- Extend JYF educational mission through the sale of historically relevant and educational products.
- Enhance ongoing cooperation and explore future promotional and working opportunities with other agencies.
- Implement the agency's Capital Improvement Plan in conjunction with the provisions of the Commonwealth of Virginia Construction and Professional Services Manual.
- Operate and maintain additional buildings and expanded grounds in accordance with JYF standards.
- Operate and maintain facilities during periods of peak visitation during the commemoration.
- Construct necessary improvements to the museums to ensure their continued ability to attract visitation and generate non-general fund revenue.
- Provide ongoing engineering/project supervision services in order to identify facilities issues, design improvements, calculate detailed project costs, and ensure quality workmanship.
- Provide landscaping improvements in fulfillment of the landscape plan and the need to screen view sheds in order to improve the public product.
- Provide sufficient security to safeguard artifacts and provide public safety.

Objective 14507.03

Increase admissions revenues by 15% in both FY2007 and 28% in FY2008 over FY2005 collections.

This Objective Supports the Following Agency Goals:

- 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.

This Objective Has The Following Measure(s):

- **Measure 14507.03.01**

  Admissions revenues

  Measure Type: Outcome **Measure Frequency:** Other

  Measure Baseline: FY2005 admissions revenue of $4,070,812.

  Measure Target: 15% increase over the baseline in FY2007 and 28% over baseline in FY2008.

  Measure Source and Calculation:
  ((FY2007 or FY2008 Admissions revenue minus $4,070,812) divided by $4,070,812) times 100.

Objective 14507.03 Has the Following Strategies:

- Develop a new, resourceful advertising and marketing program.
- Manage admission rate pricing strategy to maximize per capita sales while maintaining paid visitation base.
- Expand coverage of JYF museums, education programs, exhibits and special events through media relations efforts.
- Expand group sales and packaged tours growth through proven sales strategies in the well defined group tour and student tour markets.
- Support JYF educational tours by publishing and distributing an educational planner targeted to schoolteachers and administrators
- Engage local tourism and business audiences by hosting appropriate events at the museums.
- Enhance existing JYF marketing website monthly to promote special events, vacation packages, education programs, extended hours and other marketing initiatives.
- Utilize standard JYF customer research as well as state, national and international data to track visitor demographics and behaviors to aid in planning targeted marketing and advertising programs
- Replenish supply of four-color brochures and other printed materials used for broad based marketing initiatives.

Objective 14507.04

Five percent or less of visitors surveyed in the customer research program will complain about Facilities maintenance or operations.

This Objective Supports the Following Agency Goals:

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

This Objective Has The Following Measure(s):

- **Measure 14507.04.01**

  Customer complaints of Facilities

  Measure Type: Outcome **Measure Frequency:** Annually

  Measure Baseline: 0

  Measure Target: Complaints < 5%.

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

Objective 14507.04 Has the Following Strategies:

- Provide the fiscal, personnel and organizational resources, and structure necessary to support activities planned and implemented during the 2006 - 2008 biennium.
- Maintain sufficient staffing and resources to meet compliance and service levels as agency expands while operating in an effective and efficient manner.
- Operate and maintain additional buildings and expanded grounds in accordance with JYF standards.

- Operate and maintain facilities during periods of peak visitation during the commemoration.
- Provide ongoing engineering/project supervision services in order to identify facilities issues, design improvements, calculate detailed project costs, and ensure quality workmanship.
- Provide landscaping improvements in fulfillment of the landscape plan and the need to screen view sheds in order to improve the public product.

Objective 14507.05

The number of donors making cash or in-kind donations will increase by 10% over the prior fiscal year.

This Objective Supports the Following Agency Goals:

- 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.

This Objective Has The Following Measure(s):

- **Measure 14507.05.01**

  Donors

  Measure Type: Outcome **Measure Frequency:** Annually

  Measure Baseline: FY2006

  Measure Target: 10%

  Measure Source and Calculation:
  Number of donors making cash or in-kind donations in FY2007 divided by the number of donors making donations in FY2006 times 100 ; and the number of donors making cash or in-kind donations in FY2008 divided by the number of donors in FY2007 making donation times 100.

Objective 14507.05 Has the Following Strategies:

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

Goal #7:

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

Goal Summary and Alignment:

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

Statewide Goals Supported by Goal #7

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

Service Area Plan

Jamestown-Yorktown Foundation

Education and Extension Services (14503)

Service Area Background Information

Service Area Description

Education and Extension Services includes six areas:

1) The visitor services department provides ticket sales and customer service to visitors at two museums.

2) The interpretative services department provides costumed historical interpretation for visitors at two museums, as well as the production of reproduction historical costumes for interpretive staff to wear.

3) On-site education provides guided tours and hands-on educational classroom programs to school groups visiting the museums, as well as summer children's programs.

4) The maritime services department 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 and fabricates exhibit displays for the museum galleries and outdoor interpretive areas.

6) Outreach education and special services which includes five areas: outreach education, group reservations, volunteer services, customer research, training and development.

Service Area Alignment to Mission

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

Service Area Statutory Authority

§ 23-287 of the Code of Virginia establishes the JYF as an educational institution to administer certain historical museums and related programs. JYF is charged to further an appreciation of the contributions of the first permanent English-speaking settlers and their American Indian neighbors of Virginia and the United States to the building of our Commonwealth and nation, to commemorate the winning of American independence on the battlefield at Yorktown, and to enhance our understanding of the making of the United States Constitution and Bill of Rights, including Virginia's role in shaping the fundamental principles of the American constitutional system.

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

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

Service Area Customer Base

Customer(s)	Served	Potential
General public visitors	640,000	1,000,000
Virginia public school divisions	117	132

Anticipated Changes In Service Area Customer Base

While the number of Virginia school districts is relatively stable, the student population continues to escalate with the general demographics of the Commonwealth. This results in unsatisfied demand generated from school districts that do not currently participate in museum programs, the increased number of students in real terms and the constant turnover of grade, middle and high school student populations in school districts already served. Through the potential of existing and emerging technology, JYF has opportunity to extend products and services virtually to an almost limitless world-wide customer base.

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

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

JYF anticipates visitation to increase during the Jamestown 400th Anniversary Commemoration and the 225th anniversary of the Siege of Yorktown in the 2006 - 2008 biennium.

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

Service Area Plan

Jamestown-Yorktown Foundation

Education and Extension Services (14503)

Factors Impacting Service Area Products and Services

Customers for outreach and on-site structured education programs are impacted by school budgets. JYF current service level is 99,878 students for outreach education and 206,253 for on-site education. These levels can be affected by variable transportation costs. The upcoming 400th anniversary is expected to generate an increase in customer base.

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

Marketing and economics affect visitation levels.

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

Anticipated Changes To Service Area Products and Services

Additional stations will be required in each interpretative area due to increased demand for products and services.

New and increased skill demonstrations and pageantry will fulfill visitor expectations for a high level of quality programming during the 400th anniversary.

Increased frequency and amount of guided tours daily to meet the demands of the expanded customer base.

Addition of dramatic programming including readings, lectures and amphitheater programs daily.

Increase in staffing to facilitate the extensive programming needed.

Service Area Financial Summary

Funding for Education and Extention Services come from general funds (58%) and from non-general funds (42%) - largely admissions revenue.

	Fiscal Year 2007		Fiscal Year 2008	
	General Fund	Nongeneral Fund	General Fund	Nongeneral Fund
Base Budget	$2,876,661	$2,077,596	$2,876,661	$2,077,596
Changes To Base	$1,113,181	$577,782	$516,743	$599,510
SERVICE AREA TOTAL	**$3,989,842**	**$2,655,378**	**$3,393,404**	**$2,677,106**

Service Area Objectives, Measures, and Strategies

Objective 14503.01

Provide museum experience of high quality and appeal to a broad-based audience.

This objective is focused upon our ability to consistently provide a product of high quality to all of our customers. Its importance bears heavily upon positive, appealing "word-of-mouth" marketing.

This Objective Supports the Following Agency Goals:

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

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

This Objective Has The Following Measure(s):

- **Measure 14503.01.01**
  Visitor Survey

  Measure Type: Output **Measure Frequency:** Annually

  Measure Baseline: 2004: 95+%

  Measure Target: 95% or better rating.

  Measure Source and Calculation:
  95% of visitors surveyed will rate their experience as "good" or "excellent" on a scale of Excellent, Good, Fair and Poor.

Objective 14503.01 Has the Following Strategies:

- Implement the master education plan to coordinate all education and interpretive programs, projects, and services based on current and projected levels of attendance and current service. Review and revise plan on an annual basis.
- Coordinate and assess learning goals of education programs in relation to the Commonwealth's Standards of Learning.
- Offer dynamic and engaging multi-year on-site gallery exhibit programs and outdoor living-history programs to approximately 866,000 visitors annually.
- Manage and care for the approximately 53,000 square feet of gallery exhibits and 23 outdoor living-history exhibits.
- Provide an effective customer research program that assesses the quality and effectiveness of the visitor experience.
- Provide efficient, customer-friendly tour reservation service for groups utilizing JYF resources.
- Conduct approximately 2,200 professional, informative orientations and tours of the museums or outdoor areas.
- Support the Museums & Programs Advisory Council (MPAC) in its review and evaluation of JYF education programming and comprehensive facilities master plan programmatic element

- Conduct primary research that will serve as the basis for all exhibitions and programs utilizing staff, interns, volunteers, and outside scholars as available.
- Maintain cooperative education programs with museums and other nationally known historic sites as resources allow.
- Collaborate with public school systems and institutions of higher learning to enhance teacher education, as resources allow.
- Expand programs and services for diverse audiences (e.g., family, adult, special needs, educators, and other professionals), as resources allow.
- Implement board-approved plans for the programmatic elements.
- Provide special educational and interpretive programming for public during 2007, including hands-on presentation, special interpretive demonstrations, and weapon firing drills.
- Provide appropriate tools, including walking maps, to visitors to enhance wayfinding and access to galleries, outdoor interpretive areas and programs.
- Provide a maritime outreach program.

Objective 14503.02

Provide 240 days (120 in each fiscal year) of special commemoration related programming and events during calendar year 2007.

Integral to the commemoration will be planned special programs and events during the calendar year of 2007. Activities will be held on 120 days during the period January 1, 2007 to June 30, 2007 with an additional 120 days of activities over the period July 1, 2007 to December 31, 2007.

This Objective Supports the Following Agency Goals:

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

This Objective Has The Following Measure(s):

- **Measure 14503.02.02**

  Special Commemorative programming and events

  Measure Type: Outcome **Measure Frequency:** Other

  Measure Baseline: 0

  Measure Target: 120 days in each fiscal year during calendar year 2007.

  Measure Source and Calculation:
  Number of days of special commemorative programs and/or events in 2007.

Objective 14503.02 Has the Following Strategies:

- Expand programs and services for diverse audiences (e.g., family, adult, special needs, educators and other professionals), as resources allow.
- Implement board-approved plans for the programmatic elements.

- Provide special educational and interpretive programming for public during 2007, including hands-on presentation, special interpretive demonstrations, and weapon firing drills.

Objective 14503.03

Extend on-site structured education programs to serve 230,000 students in each year of the 2006-2008 biennium.

During the 2006-2008 biennium, increase the number of on-site structured education programs.

This Objective Supports the Following Agency Goals:

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

This Objective Has The Following Measure(s):

- **Measure 14503.03.03**

  Students served by on-site structured education programs:

  Measure Type: Outcome **Measure Frequency:** Annually

  Measure Baseline: 206,253 students served in FY2005.

  Measure Target: 230,000 on-site structured education students per fiscal year during the 2006-2008 biennium.

  Measure Source and Calculation:
  Number of on-site structured students served.

Objective 14503.03 Has the Following Strategies:

- Implement, review and annually revise the master education plan to coordinate all education and interpretive programs, projects, and services based on current and projected levels of attendance and current service. annual basis.
- Provide efficient, customer-friendly tour reservation service for groups utilizing JYF resources.
- Provide special educational and interpretive programming for public during 2007, including hands-on presentation, special interpretive demonstrations, and weapon-firing drills.

Objective 14503.04

Extend outreach education programs to serve 142,000 students in 125 Virginia school districts each year of the 2006-2008 biennium.

During the 2006-2008 biennium, increase the number of Virginia school districts and the number of students served through the outreach program.

This Objective Supports the Following Agency Goals:

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

This Objective Has The Following Measure(s):

- **Measure 14503.04.04**

  Outreach education programs

  Measure Type: Outcome **Measure Frequency:** Annually

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

  Measure Target: 142,000 students in 132 Virginia school districts.

  Measure Source and Calculation:
  Number of students within the number of school districts in Virginia in each fiscal year of the 2006-2008 biennium.

Objective 14503.04 Has the Following Strategies:

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

Service Area Plan

Jamestown-Yorktown Foundation

Collections Management and Curatorial Services (14501)

Service Area Background Information

Service Area Description

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

Service Area Alignment to Mission

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

Service Area Statutory Authority

§ 23-287 of the Code of Virginia establishes the Jamestown-Yorktown Foundation as an educational institution to administer certain historical museums and related programs. JYF is charged to further an appreciation of the contributions of the first permanent English-speaking settlers and their American Indian neighbors of Virginia and the United States to the building of our Commonwealth and nation, to commemorate the winning of American independence on the battlefield at Yorktown, and to enhance our understanding of the making of the United States Constitution and Bill of Rights, including Virginia's role in shaping the fundamental principles of the American constitutional system.

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

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

Service Area Customer Base

Customer(s)	Served	Potential
General public visitors	640,000	1,000,000

Service Area Partners

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.

Service Area Plan

Jamestown-Yorktown Foundation

Collections Management and Curatorial Services (14501)

Service Area Products and Services

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

Factors Impacting Service Area Products and Services

Attendance is expected to increase from nearly 600,000 in calendar year 2004 to 871,000 in the calendar year 2007. Significant national attention will be brought to the JYF sites. Expectations, in terms of regional and state economic impact, are high. This should prove to be the curatorial services most challenging biennium in recent history.

Anticipated Changes To Service Area Products and Services

During the 2006-2008 biennium, JS is in the final fabrication stage of a new permanent gallery, and placing artifacts in a 30,000-square-foot space. YVC also will be in the final stages of the renovation of the Declaration of Independence and Mathews galleries in preparation for the 225th anniversary of the Battle of Yorktown. A main feature of the new Mathews gallery will be an exhibit entitled "A Nation of Immigrants". During 2007-2008, curatorial services will support a four- phased changing JS exhibit, "The World of 1607", which will feature 17th-century artifacts from all over the world for the 400th commemoration, and work will begin on the replacement of the remaining YVC galleries.

Service Area Human Resources Summary

Service Area Human Resources Overview

Service Area Full-Time Equivalent (FTE) Position Summary

Effective Date:

Total Authorized Position level .....

Vacant Positions .....

Non-Classified (Filled).....

Full-Time Classified (Filled) .....

Part-Time Classified (Filled) .....

Faculty (Filled) .....

Wage .....

Contract Employees .....

Total Human Resource Level .....

Factors Impacting Service Area Human Resources

Anticipated Changes in Service Area Human Resources

Service Area Plan

Jamestown-Yorktown Foundation

Collections Management and Curatorial Services (14501)

Service Area Financial Summary

Funding for Collections and Curatorial Services comes from general funds (49%) and from non-general funds (51%) - largely admissions revenue. Non-general funds from the agency's private affiliate, the JYF, Inc., are used to purchase and conserve artifacts on behalf of the state agency with donated funds. At the time of sale, ownership of the artifact is transferred to state government and placed under the state's self-insurance program. Additionally, public and private grants (both restricted and unrestricted) supplement non-general funds.

	Fiscal Year 2007		Fiscal Year 2008	
	General Fund	Nongeneral Fund	General Fund	Nongeneral Fund
Base Budget	$330,138	$347,766	$330,138	$347,766
Changes To Base	$16,491	$75,055	$16,491	$93,962
SERVICE AREA TOTAL	**$346,629**	**$422,821**	**$346,629**	**$441,728**

Service Area Plan

Jamestown-Yorktown Foundation

Collections Management and Curatorial Services (14501)

Service Area Objectives, Measures, and Strategies

Objective 14501.01

Manage and care for the collections, and for borrowed artifacts for "The World of 1607" special commemorative exhibition, according to collections policy guidelines, AAM standards and artifact loan agreements.

This Objective Supports the Following Agency Goals:

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

This Objective Has The Following Measure(s):

- **Measure 14501.01.00**

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

  Measure Type: Outcome **Measure Frequency:** Annually

  Measure Baseline: Zero in FY2005.

  Measure Target: Zero occurances of lost or damaged artifacts.

  Measure Source and Calculation:
  No occurances of lost or damaged artifacts.

Objective 14501.01 Has the Following Strategies:

- Review all aspects of collections management and policy to maintain American Association of Museums (AAM) accreditation.
- Review display cases, lighting and HVAC systems to ensure safety for both artifacts and the public.
- Monitor temperature and humidity in the galleries, assess collections management facility needs in accordance with guidelines and procedures, and integrate requirements into the JYF master planning process.
- Actively acquire artifacts for the collection using private funds according to the master artifact acquisition lists.
- Move artifacts from appropriate storage facilities to JS to open permanent exhibit galleries and "The World of 1607" special exhibition.