Jamestown-Yorktown Foundation Board of Trustees
NOVEMBER 10, 2026
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Online Access for Meetings via Microsoft Teams

We understand that individual circumstances may occasionally make in-person attendance difficult. In those cases, virtual or phone participation through MS Teams can be accommodated, in accordance with VA Code 2.2-3708.3. Please note that a majority of the Board Trustee committee must be physically present at the meeting to approve remote ability to vote.

Microsoft Teams Meeting

Join: https://teams.microsoft.com/meet/277968847241786?p=kHxgeBiUsJJ4oVGiWN
Meeting ID: 277 968 847 241 786
Passcode: 7aw6tm9K

Dial in by phone
+1 434-230-0065
Phone conference ID: 824 209 487#

JYF Board of Trustees
Business Session

Tuesday, November 10, 2026
American Revolution Museum at Yorktown
Classrooms A-B-C or Virtual Via Teams
4:00 PM

Senator Thomas K. Norment, Jr., *Chairman*
Mrs. Sue H. Gerdelman, *Vice Chairman*
Senator Mamie E. Locke, *Secretary*
Delegate Delores L. McQuinn, *Treasurer*

AGENDA

I. Call to Order – Senator. Norment

II. Approval of Minutes: May 7, 2026 – Senator Norment *(Action Required)*
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III. Executive Director's Report – Ms. Coleman

IV. Jamestown-Yorktown Foundation, Inc. Initiatives – General Harrison

V. Jamestown-Yorktown Educational Trust Report – Mr. Acuff

VI. Legislative Task Force Update – Mr. Cox

VII. Committee Reports *(Actions May Be Required)*

A. Administration & Personnel Committee – Delegate Fowler
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B. Buildings & Grounds Committee – Chief Adkins
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C. Executive and Finance Committees – Delegate McQuinn
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D. Marketing Committee – Mrs. Morgan
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E. Nominating Committee Report – Senator Locke

F. Public Programming Committee – Delegate Carr
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VIII. Executive Director Performance & Compensation Review Task Force – Senator Norment

IX. Public Comment – Senator Norment

X. Other Business – Senator Norment

XI. Adjournment – Senator Norment *(Action Required)*

Mission

The Jamestown-Yorktown Foundation shall foster through its living-history museums – Jamestown Settlement and the American Revolution Museum at Yorktown – an 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.

Trustees Present: Chief Stephen R. Adkins, Mrs. Laura W. Bailey, Mrs. Ann Baise, Mr. David Botkins, Mr. M. Kirkland Cox, Mr. H. Benson Dendy III, Ms. Julie Dime, Mr. Thomas DiStanislao, Senator J.D. Diggs, Ms. Suzanne O. Flippo (Remote), Mrs. Sue H. Gerdelman, Mr. Terry E. Hall, Lt. Gov. Ghazala Hashmi, Delegate M. Keith Hodges, Mr. Charles E. James, Senator Mamie E. Locke, Mrs. Anne Marie Morgan, Senator Ryan McDougle (Remote), Delegate Delores L. McQuinn, Senator Thomas K. Norment, and Delegate Shelly A. Simonds.

Trustees Absent: Mr. A. Marshall Acuff, Jr., Ms. Jamie T. Burke, Delegate Betsy Carr, Mrs. Gloria M. Chambers, Delegate Buddy Fowler, Jr., Senator L. Louise Lucas, Delegate Ken Plum, Speaker Donald L. Scott, Jr., Delegate Luke D. Torian, and Senator Schuyler VanValkenburg.

Directors Present: Ms. Bentley Andrews, Mrs. Mari Ann Banks, Ms. Fran Bradford, Mrs. Terry Buntrock, Ms. Helen Zadarlik Cousins, Mr. Terry Hall, General Michael T. Harrison, Sr., Mrs. Barbara Hamm Lee, Mr. Fred Palmore, Mr. Burt Pinnock, Mrs. Helen Reveley, Ms. Adria Vanhoozier (Remote), Dr. Bill White, Dr. Karin Wulf (Remote).

Directors Absent: Mrs. Carolyn Abbitt, Mr. Bill Longan, and Mr. Tom Tullidge.

JYF Staff/Guests: Ms. Christy Coleman, Mrs. Kate Maxlow (Sec. of Education Rep), Ms. Ambria Wood (AG Rep), Ms. June Laffey (COS for Lt. Gov), Dr. Mariruth Leftwich, Ms. Lisa McDonald Lucas, Dr. Juliet Machie, Mr. Coy Mozingo, Mr. Will Nixon, Ms. Tracy Perkins, Ms. Melissa Thompson, and Mrs. Glenda Turner.

I. Call to Order

The Joint Business Session of the Board of Trustees and Board of Directors was called to order by Senator Norment, who welcomed members and guests and expressed appreciation for the thoughtful discussions and engagement throughout the preceding two days. He extended a special welcome to the Lieutenant Governor of Virginia and thanked her for her attendance and continued interest in the Foundation's mission and activities.

Senator Norment recognized several longtime supporters and valued partners of the Foundation. He acknowledged Mary Ann Banks for her distinguished service, lasting contributions, and honorary designation; Helen Collins for her service to the Board of Directors; and Fred Palamore, who was unable to attend due to health concerns.

Senator Norment confirmed that an in-person quorum was present, permitting remote participation in accordance with applicable provisions of Virginia law. Roll call was conducted for both the Board of Trustees and the Board of Directors, and a quorum was established for each governing body.

II. Approval of Minutes

The minutes of the November 12, 2025, meeting were presented for consideration. Upon motion duly made and seconded, the minutes were unanimously approved as presented.

III. Jamestown-Yorktown Foundation, Inc. Initiatives

Mr. Hall presented a report on Foundation, Inc. initiatives, highlighting current fundraising performance and recent board developments. He reported that the Annual Fund had reached approximately $628,000, representing 70 percent of its $900,000 goal. Major gifts totaled more than $4.3 million, exceeding the goal of $3.6 million and resulting in overall fundraising performance at 113 percent of goal. Mr. Hall reviewed philanthropic funding priorities, including the Digital Media Studio, Title I school programming, teacher institutes, Indigenous Peoples programming, and upcoming special exhibitions.

He also recognized recent leadership transitions, thanking Mr. Tom Tullidge for twelve years of service as a director and welcoming Mr. Tom Osgood and Mr. Roscoe Roberts as a newly elected member of the Board of Directors. Mr. Hall noted the recent amendment to the Foundation, Inc. bylaws establishing the designation of Director Emerita/Emeritus and announced that Mrs. Mary Ann Banks had been selected as the inaugural recipient. Mr. Hall announced the incoming slate of officers:

- Michael Harrison, President
- Bill White, Vice President
- Fran Bradford, Treasurer
- Helen Cousins, Secretary

He further noted that he would continue to serve in an advisory capacity as Immediate Past President. Mr. Hall concluded by encouraging continued participation in the Annual Fund and emphasized the importance of achieving 100 percent board giving.

IV. Jamestown-Yorktown Educational Trust Report

Speaker Kirk Cox, reporting on behalf of Mr. Acuff, presented the Educational Trust report. He reported record-setting museum shop performance at both sites. Sales at the Yorktown Museum Shop exceeded the previous year's totals by 85 percent and surpassed monthly budget projections by 65 percent, due largely to

merchandise associated with the *Outlander: Costumes Woven in Time* exhibition. Combined museum shop sales for March increased 33 percent compared to the same period in the prior year. Year-to-date sales across both museum stores exceeded $2.08 million, representing an increase of more than 14 percent over the previous year. Speaker Cox also provided an update on the Jamestown Settlement Café Refresh Project, reporting that architectural and engineering designs had been completed. The Trust has committed approximately $270,000 toward the project, and the overall construction estimate remains $2.5 million, subject to the availability of state and other funding sources.

V. Executive Director's Report

Ms. Coleman presented the Executive Director's Report, organized around the Foundation's strategic pillars of People, Programs, and Communication. Under the People pillar, she highlighted significant compensation improvements achieved since 2021, noting that the average hourly wage had increased from $10.82 to approximately $18.20 through strategic planning and internal budget adjustments. She also reviewed the establishment of the Human Resources and Professional Development Department and emphasized the organization's commitment to employee development and leadership cultivation. Under Programs, Ms. Coleman highlighted continued innovation by the Museum Operations and Learning teams, as well as strengthened partnerships with cultural and educational organizations throughout the Commonwealth. She acknowledged ongoing challenges related to facility maintenance and skilled-trades recruitment while commending staff for their dedication and professionalism in maintaining high operational standards. Under Communication, she recognized the work of the Marketing and Communications team, led by Glenda Turner, in advancing brand modernization, refining organizational messaging, and strengthening digital outreach and audience engagement.

Ms. Coleman also provided an update on Virginia's Semiquincentennial commemoration efforts (VA250), noting increased visitation to Yorktown and expanded national visibility, including upcoming coverage by NBC's *Today Show*. She emphasized that the commemoration effort extends through 2031 and represents a significant opportunity for sustained audience growth and engagement. Following discussion and responses to questions from board members, Ms. Coleman concluded her report.

VI. Committee Reports

Buildings & Grounds Committee

Chief Adkins reported on several completed facilities projects, including major waterline repairs, fire suppression system repairs, and replacement of elevator

seals. He also noted an estimated additional funding requirement of $1.2 million to complete restoration of the *Susan Constant*.

The committee reviewed maintenance reserve priorities and planned capital investments, including the Jamestown Settlement Café redesign, roof replacements, walkway and lighting improvements, and ADA accessibility upgrades. Dr. Markey presented deferred maintenance needs totaling approximately $11 million.

Chief Adkins also discussed the historical significance of the 1677 Treaty of Middle Plantation and preliminary planning for a potential 350th anniversary commemoration in 2027. In addition, he provided updates regarding Tree Hill Farm and its cultural and historical significance.

Upon motion duly made and seconded, the committee report was unanimously approved.

Marketing Committee

Mr. Botkins, presenting on behalf of Mrs. Chambers, provided the Marketing Committee report. The committee reviewed integrated marketing initiatives, including earned media, advertising, social media engagement, and national publicity efforts. Attention was given to the success of the *Outlander: Costumes Woven in Time* exhibition, which coincided with the release of the television series' final season and generated more than 10,500 ticket sales, along with substantial national media exposure. The committee also reviewed communication strategies supporting VA250 initiatives and visitor segmentation efforts. Upon motion duly made and seconded, the committee report was unanimously approved.

Public Programming & Acquisitions Committee

Ms. Andrews presented the Public Programming & Acquisitions Committee report. The committee approved prior meeting minutes and received updates on current and upcoming exhibitions, including *Outlander: Costumes Woven in Time*, *Give Me Liberty*, and *A Good and Just Peace*. Members also received reports on educational programming, outreach initiatives, maritime activities, including *Godspeed's* participation in Tall Ships events, and restoration efforts related to the *Susan Constant*.

Curatorial staff provided updates on artifact conservation projects, exhibition loans, and ongoing consultations with tribal partners nationwide under the Native American Graves Protection and Repatriation Act (NAGPRA). The committee recommended approval of the FY2027 Annual Acquisitions Plan. Upon motion duly made and seconded, the recommendation was unanimously approved.

Nominating Committee

Mr. Dendy presented the Nominating Committee report and recommended the election of William "Bill" Murray to a one-year citizen seat on the Board of Trustees.

Mr. Dendy highlighted Mr. Murray's experience in corporate affairs, philanthropy, and state government service. Upon motion duly made and seconded, the Board unanimously approved the appointment. The committee report was subsequently approved.

Administration & Personnel Committee

Mr. James reported on significant accomplishments within Human Resources, including completion of a comprehensive market and pay equity study, implementation of a new performance management system, and publication of ten new human resources policies. He reviewed compensation-related matters, including the Commonwealth's proposed three percent salary increase for classified employees and concerns regarding wage employees who remain ineligible for the proposed one-time bonus. Positive trends in employee retention and reductions in time-to-fill metrics were also highlighted. Mr. James emphasized the importance of continued workforce investment in sustaining organizational excellence. Upon motion duly made and seconded, the committee report was unanimously approved.

Executive & Finance Committee

Delegate McQuinn and Senator Norment presented the Executive & Finance Committee report. The committee reviewed the Foundation's financial position, noting that operations remain within budget despite increasing costs associated with personnel, healthcare, utilities, insurance, and infrastructure maintenance. While revenues remain stable, growth has not kept pace with escalating operating expenses. The committee presented the proposed FY2027 State Operating Budget totaling $24.9 million for provisional approval, pending final action by the Virginia General Assembly. Major cost drivers include compensation and healthcare increases, operational staffing requirements, security and utility costs, insurance, equipment replacement, infrastructure improvements, and deferred maintenance needs. Upon motion duly made and seconded, the Board unanimously approved the committee report, the provisional FY2027 Operating Budget, wage-related recommendations, and updates to the Jamestown-Yorktown Foundation Code of Ethics.

VII. Public Comment

Senator Norment called for public comment. No public comments were offered.

VIII. Other Business

Members discussed compensation disparities affecting wage employees under current state guidelines and encouraged continued legislative advocacy to address those inequities. Senator Norment thanked members for their continued service and reaffirmed the Board's commitment to maintaining the Jamestown-Yorktown

Foundation's position as a national leader in historical education and public engagement. He also expressed appreciation to the Lieutenant Governor for her participation and extended an invitation for future engagement with the Foundation.

IX. **Adjournment**

There being no further business to come before the Board, a motion to adjourn was made and seconded. The motion carried unanimously, and the meeting was adjourned at 2:35 p.m. on Thursday, May 7, 2026, at Jamestown Settlement in Williamsburg, Virginia.

Electronic Meetings Policy of the Jamestown-Yorktown Foundation Board of Trustees

Policy on electronic meetings held through electronic communication means under § 2.2-3708.3 of the Code of Virginia. The Code of Virginia § 2.2-3708.3 requires public bodies to adopt a policy regarding remote participation by members and all-virtual meetings.

Remote Participation Policy

It is the policy of the Jamestown-Yorktown Foundation Board of Trustees that individual board members may participate in meetings virtually as permitted by § 2.2-3708.3 of the *Code of Virginia.* This policy shall apply to the entire membership and without regard to the identity of the member requesting remote participation or the matters that will be considered or voted on at the meeting. Whenever an individual member wishes to participate from a remote location, the law requires a quorum of the Jamestown-Yorktown Foundation Board of Trustees be physically assembled at the primary or central meeting location.

Members are permitted to participate in meetings remotely under the following three circumstances:

1. The member has a temporary or permanent disability or other medical condition that prevents the member's physical attendance;

2. A medical condition of a member of the member's family requires the member to provide care that prevents the member's physical attendance;

3. The member’s principal residence is more than 60 miles from the meeting location identified in the required notice for such meeting; or

4. The member is unable to attend the meeting due to a personal matter and identifies with specificity the nature of the personal matter. However, the member may not use remote participation due to personal matters for more than two meetings per calendar year or 25 percent of the meetings held per calendar year rounded up to the next whole number, whichever is greater.

When all procedural requirements are met, board members participating in meetings remotely may take part in discussions, make motions, vote, join in closed meetings, and otherwise participate fully as if such member was physically present. If procedural requirements are not met, however, then members may only monitor the meeting and cannot otherwise participate.

Requests for remote participation must be sent to Jamestown-Yorktown Foundation staff, who will notify the Board Chair. Requests will be approved automatically unless the member’s participation would violate FOIA. If participation is challenged, the matter will be put to a vote of the Board Members at the meeting. The request and reason for remote participation will be recorded in the meeting minutes.

All-Virtual Meetings Policy

It is the policy of the Jamestown-Yorktown Foundation that the Jamestown-Yorktown Foundation Board of Trustees may hold all-virtual public meetings pursuant to subsection C of § 2.2-3708.3 of the *Code of Virginia*. Whenever the Jamestown-Yorktown Foundation Board of Trustees holds an all-virtual public meeting, members and staff must comply with the following statutory requirements:

1. An indication of whether the meeting will be an in-person or all-virtual public meeting must be included in the required meeting notice along with a statement notifying the public that the method by which a public body chooses to meet shall not be changed unless the public body provides a new meeting notice in accordance with the provisions of § 2.2-3707;

2. Public access to the all-virtual public meeting is provided via electronic communication means;

3. The electronic communication means used allows the public to hear all members of the public body participating in the all-virtual public meeting and, when audio-visual technology is available, to see the members of the public body as well;

4. A phone number or other live contact information is provided to alert the public body if the audio or video transmission of the meeting provided by the public body fails, the public body monitors such designated means of communication during the meeting, and the public body takes a recess until public access is restored if the transmission fails for the public;

5. A copy of the proposed agenda and all agenda packets and, unless exempt, all materials furnished to members of a public body for a meeting is made available to the public in electronic format at the same time that such materials are provided to members of the public body;

6. The public is afforded the opportunity to comment through electronic means, including by way of written comments, at those public meetings when public comment is customarily received;

7. No more than two members of the public body are together in any one remote location unless that remote location is open to the public to physically access it;

8. If a closed session is held during an all-virtual public meeting, transmission of the meeting to the public resumes before the public body votes to certify the closed meeting as required by subsection D of § 2.2-3712;

9. The public body does not convene an all-virtual public meeting (i) more than two times per calendar year or 50 percent of the meetings held per calendar year rounded up to the next whole number, whichever is greater, or (ii) consecutively with another all-virtual public meeting; and

10. Minutes of all-virtual public meetings held by electronic communication means are taken as required by § 2.2-3707 and include the fact that the meeting was held by electronic communication means and the type of electronic communication means by which the meeting was held. If a member's participation from a remote location pursuant to these requirements is disapproved because such participation would violate the policy adopted pursuant to subsection D of § 2.2-3708.3, such disapproval shall be recorded in the minutes with specificity.

This policy applies to all committees, subcommittees, and advisory groups of the Jamestown-Yorktown Foundation Board of Trustees.

Jamestown-Yorktown Foundation
2027-29 BOARD OF TRUSTEES AND COMMITTEE MEETING DATES

Meeting Month	Board/Committee Meeting	2027	2028	2029
April	Executive Director's Performance and Compensation Review Task Force (2 PM)	April 14	April 12	April 11
May	Joint Boards: JYF Board of Trustees and JYF, Inc. Board of Directors (Two days of meetings)	May 5-6	May 3-4	May 2-3
September	JYF Executive and Finance Committees (12 PM)	Sept. 2	Sept. 7	Sept 6
October	Executive Director's Performance and Compensation Review Task Force (2 PM)	Oct. 20	Oct. 18	Oct. 24
November	JYF Board of Trustees Fall Meeting	Nov. 9	Nov. 14	Nov 13

Please note: Dates are subject to change based on the schedule of the board chairman and committee leadership.

Jamestown-Yorktown Foundation **Tuesday, November 10, 2026**

Buildings & Grounds Committee **American Revolution Museum at Yorktown**
Classrooms ABC
8:30 AM

Chief Stephen R. Adkins, Chair
Delegate M. Keith Hodges, *Vice Chair*
Mrs. Anne Green Baise
Senator J.D. "Danny" Diggs
Mr. P. Thomas DiStanislao
Delegate Hyland F. "Buddy" Fowler, Jr.
Delegate Alfonso H. Lopez
Delegate Delores L. McQuinn
Senator Thomas K. Norment, Jr.
Mr. Fred W. Palmore III (Inc. Liaison)
Delegate Luke E. Torian
Senator Schuyler T. VanValkenburg

AGENDA

I. Call to Order – Chief Adkins

II. Approval of Minutes: May 6, 2026 – Chief Adkins *(Action required)*
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III. Facilities Maintenance Reports – Chief Adkins
p. 24-30

A. Facilities Maintenance Report

B. Ships Maintenance Report

IV. Capital & Maintenance Reserve Projects Updates – Dr. Machie

A. Jamestown Settlement Lobby Project Update p. 31

B. Capital, MR & Deferred Maintenance Projects Report p. 33

C. FY2028 Legislative Capital Budget Requests p. 38

D. FY2027 Maintenance Reserve Budget *(Action Required)*
p. 39

V. Other Business – Chief Adkins

VI. Adjournment – Chief Adkins *(Action required)*

Committee Members Present:	Chief Stephen R. Adkins, Sr., Delegate M. Keith Hodges, Mrs. Ann Green Baise, Senator J.D. Diggs, Mr. P. Thomas DiStanislao III, Delegate Hyland F. Fowler, Jr., Mr. Charles E. James, Sr., and Delegate Delores L. McQuinn
Committee Members Absent:	Mr. Fred Palmore III and Delegate Luke E. Torian
Other Board Members Present:	Ms. Mari Ann Banks, Mr. David Botkins, Ms. Frances C. Bradford, Mrs. Gloria M. Chambers, Mr. Terry E. Hall, Mrs. Barbara Hamm Lee, MG Michael T. Harrison, Sr., Secretary of Education Dr. Jeffrey O. Smith, and Mr. William E. White
Other Guests Present:	Dr. Kate Maxlow (Sr Advisor to the Secretary of Education, Office of the Governor)
Staff Present:	Ms. Christy S. Coleman, Dr. Mariruth Leftwich, Dr. Juliet Machie, Mr. Coy M. Mozingo, Mr. William R. Nixon, Mrs. Melissa Thompson, Mrs. Glenda H. Turner, Mr. Rick Begley, Mr. Josh Cantrell, Capt. Eric Speth, Mrs. Isabelle Cantrell, Ms. Claire Cole, Ms. Lisa Lucas, Mr. Demetrius White, Ms. Meghan Van Joosten, Ms. Kendall Schoonover (remote), Mr. Michael Klimenko (remote), and Ms. Sarah Gates Haendler (remote)

I. Call to Order

The Wednesday, May 6, 2026, meeting of the Jamestown-Yorktown Foundation (JYF) Buildings & Grounds Committee was called to order by Chief Adkins at 1:30 p.m., at the Jamestown Settlement. He welcomed all to the meeting. A roll call for attendance was taken for the meeting and quorum was confirmed. No remote participation vote was required as no committee members were present remotely and quorum had already been confirmed via attendance.

II. Approval of Minutes

Chief Adkins directed members to page 22 of the packet, to review the minutes from the Wednesday, November 12, 2025, meeting and requested a motion for approval. Delegate Hodges made a motion, with second by Delegate McQuinn. The minutes were approved as presented by unanimous vote with no discussion.

III. Facilities Report

A. Chief Adkins directed members to page 25 of the binder to present the Facilities Maintenance and Ships Maintenance Reports. The Facilities Maintenance Report summarized key updates: electrical system support of three-month long Winter Lantern Festival, repaired underground ruptured water lines at both museums, replacement of a jack seal for the mezzanine elevator at the American Revolution Museum at Yorktown, and continued repairs of fire suppression system failures and leaks.

The Grounds and Custodial teams worked tirelessly in preparation for and cleaning up after multiple major events across both museum sites. This included Military Through the Ages and the Winter Lantern Festival. The team also supported four snow events, brick and sidewalk leveling and grinding, tree work to include a fallen tree against the building and trimming of the line of trees outside the Phase IV section of the Great Hall.

Facilities Manager, Josh Cantrell, described the photos contained on pages 26-28 of the meeting binder and answered related questions.

B. Director of Maritime Operations Eric Speth presented the Ships Maintenance Report. Godspeed completed a scheduled biennial dry-dock period for routine preventive maintenance as well as the biennial preventive maintenance on the vessel's masts, yards, sails, and rigging. Susan Constant remains in dry-dock at Mystic Seaport, CT. The project schedule and budget are under revision due to bottom planking issues noted in the report and photos. The additional repairs were estimated to add $1,223,107 to the budget and has pushed the return of the vessel to Summer 2027.

Dr. Machie spoke on the funding request to address the additional repairs. She noted that the original funding for the project was $4.4 million. With $1.2 million in additional repairs, the total project cost is now $5.7 million. This is a 32% increase, which will require multiple levels of approval, up to the Governor's designee.

Capt. Speth answered a few additional questions relating to the project.

IV. Capital & Maintenance Reserve Projects Update

Chief Adkins called on Dr. Juliet Machie to facilitate the next agenda items.

A. Dr. Machie presented the Capital and Maintenance Reserve Projects report. This included the list of currently funded projects and their status. The completed projects include Channel Dredging, Changing Gallery Lighting, and two surveys to inform future projects.

B. Dr. Machie presented the Deferred Maintenance Budget Plan (attached) for approval, contingent on securing the $11 million requested in the FY2028 budget. She invited all in attendance to join JYF staff for a grounds tour this evening to illustrate some of the items on the Deferred Maintenance list.

Following the presentation, a motion was requested to approve the Deferred Maintenance Project Plan as presented contingent upon funding appropriation. The motion was made by Delegate Hodges and seconded by Delegate McQuinn. The vote was unanimous for approval with no additional discussion.

V. Other Business

Chief Adkins asked if there was any other business to come before the committee. Hearing none, he offered thanks to committee members and staff for their continued dedication and leadership in support of JYF and reminded everyone to attend the special presentation at 6:15 p.m.

VI. Adjournment

There being no further business, a motion to adjourn was made by Senator Diggs and seconded by Delegate Hodges. The motion carried without objection. Chief Adkins adjourned the May 6, 2026, meeting of the Buildings & Grounds Committee at 2:18 p.m.

Jamestown-Yorktown Foundation
BUILDINGS & GROUNDS COMMITTEE
November 10, 2026

FACILITIES MAINTENANCE REPORTS

Introduction

This report presents updates on the management and maintenance of JYF facilities and maritime vessels.

Facilities Maintenance Report

From the months of May 2026 through October 2026, the Facilities Maintenance team consisting of Trades technicians, Grounds crew and Custodial staff performed over 1,200 Work Orders of which 800+ were Preventative Maintenance tasks and more than 400 were unscheduled maintenance tasks. During this time the team completed such projects as:

- Updating and upgrading outdoor power at the amphitheater at ARM-Y. This upgrade will allow greater capability for outdoor events and future opportunities.
- We responded to multiple power outages due to strong summer storms; these storms have caused significant wear and fatigue on our building's generators and transfer switches.
- Our team continues to respond to door repairs on many of our aging exterior doors at both museum locations.
- Working with our Capital Projects team to prioritize and develop scopes of work for our Deferred Maintenance projects list.
- Maintaining and managing our fleet of 30+ state owned vehicles, working with other departments on their respective needs for vehicles, including the purchase of two new vehicles for the MOE Department.
- Implementation of a new Computer Maintenance Management System to manage facilities assets and work orders has begun. This change is streamlining our capabilities and giving both our techs and our Foundation wide staff a more user friendly and technology forward system to work with. The switch over went live in October 2026.

The Grounds and Custodial teams worked tirelessly in preparation for and cleaning up after multiple major events across both museum sites, including World Bee Day, Jamestown Day, Outlander Day, America's 250th celebration, 45th Annual Shrimp Feast, Family Frights and many others.

Additional work by the Grounds and Custodial teams include:

- Beautification of both museum locations in preparation of America's 250th celebration.
- Repairs were made to the Great Mall lawn after hosting the rain-soaked Shrimp Feast, several vehicles and trailers left large ruts in the grass after a passing severe thunderstorm during the event.
- As a result of the many strong summer storms, our grounds team responded to multiple reports of downed tree limbs and debris across the properties. Also worked with a contractor to clean up high branches to prevent future falling limbs.

Repairs needed after the 2026 Shrimp Feast





Jamestown-Yorktown Foundation
BUILDINGS & GROUNDS COMMITTEE
November 10, 2026

SHIPS' MAINTENANCE REPORTS

This report covers ships' maintenance updates from May 2026 to October 2026.

2026 *Susan Constant*

- Foundation staff continue to work with the US Coast Guard on Susan Constant repair inspections at Mystic Seaport Museum Shipyard. The last inspection occurred in July. Coast Guard inspectors continue to note the quality of the repairs meeting USCG requirements, and they appreciate the level of detail provided in Foundation written reports that become part of the USCG official repair record.
- Shipwrights completed 100% of hull planking, hull caulking, and priming above the main wale on the port and starboard sides of the hull.
- Shipwrights completed 100% of the fabrication and installation of gunport doors.
- Shipwrights completed 100% of the fabrication and installation of the stern gallery.
- Shipwrights completed 90% of the deck re-caulking project including completion of caulk removal, completion of deck surface sanding, and completion of replacement of specific damaged deck planks. Shipwrights are working on recaulking deck seams using traditional caulking techniques and modern sealants.
- Shipwrights completed 100% of the main mast partner replacement.
- Shipwrights completed 15% of the main mast and fore mast top platform replacement.
- Mystic Seaport Museum ship carvers completed repairs to Susan Constant's billethead, a small decorative carving at the end of the beakhead.
- Shipwrights recently started replacing the beakhead structure. A mockup was created using parts from the previous version. New wood will be installed as part of the replacement process.
- As reported at the May Board meeting, late last year hidden deterioration was discovered during contracted planking replacement in widespread areas of planking and one frame below the waterline. Following this discovery, the Foundation

requested the Shipyard provide a cost estimate and schedule impact for additional bottom planking repairs. A change order was processed in June to include replacement of all bottom planking, additional frame repairs, and removal and re-installation of the rudder and propeller struts. The change order adds $1.2 million to the project cost. Susan Constant is scheduled for completion and launch in September 2027. The vessel is expected to return to Jamestown Settlement in October 2027.

- As noted in the May report, Susan Constant's current paint scheme is more elaborate than in the original research conducted by Brian Lavery. The current recommendation is to simplify the paint scheme based on Mr. Lavery's original and on-going research into this topic. Maritime and interpretive staff are collaborating to create a new paint scheme for Susan Constant.
- Susan Constant's standing rigging was returned from Mystic Seaport Museum to Jamestown Settlement for preventive maintenance by Foundation staff and volunteers. As this service is completed, rig parts will be returned to Mystic for re-installation toward the end of the project
- Foundation staff are working with Garmin Corporation on a partial in-kind donation for a replacement electronic navigation system.
- The project is on schedule.

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Godspeed

- Completed biennial preventive maintenance on the vessel's masts, yards, sails and rigging.
- The US Coast completed a thorough biennial post dry-dock hull inspection. Coast Guard inspectors found the main engine exhaust insulation requiring replacement. Foundation staff replaced the noted engine exhaust insulation in accordance with US Coast Guard standards.
- The US Coast completed Godspeed's required annual Small Passenger Vessel inspection. Coast Guard inspectors were very complementary of Godspeed's overall condition and the operational capability of the crew.
- Maritime staff and volunteer crew continued work on hull, rigging, and mechanical preventive maintenance throughout this period. Projects included hull and deck caulking; painting; rigging maintenance; engine maintenance; electrical systems maintenance; and marine refrigerator/freezer system repair.

Discovery

- Maritime staff and volunteer crew continued work on hull, rigging, and mechanical preventive maintenance throughout this period. Projects included deck caulking; rigging maintenance; engine maintenance; and electrical systems maintenance.
- The US Coast completed Discovery's annual Attraction Vessel inspection. This certification allows visitors to tour the ship while tied up dockside at Jamestown Settlement. Coast Guard inspectors were very complementary of Discovery's overall condition and the crew's preparedness to respond to dockside emergencies.

Jamestown-Yorktown Foundation
BUILDINGS & GROUNDS COMMITTEE
November 10, 2026

JAMESTOWN SETTLEMENT LOBBY PROJECT UPDATE

The **Jamestown Settlement Lobby Flooring & Renovation Project** has entered the construction phase. The main lobby closed to the public on **October 12, 2026**, and is expected to remain closed for approximately four months.

During construction, all ticketing and visitor services have been relocated to a temporary lobby in the former **Jamestown Settlement Orientation Theater**. Ample signage and staff are available throughout the museum to assist visitors and direct them to services.

Construction Progress

The flooring replacement and lobby renovation projects are being completed concurrently under a single general contractor. This coordinated approach is expected to reduce the overall duration of the lobby closure.

- Demolition is substantially complete. Installation of window film is nearing completion, and electricians began installing new mezzanine lighting on October 27.
- To help maintain project timelines, the contractor adjusted portions of the work schedule to begin as early as 4:00 a.m. This allowed for faster installation of temporary partitions and vestibule configurations.
- To avoid delays associated with the long lead time for new doors, the Owner, Architect, and General Contractor team developed a temporary partition solution.
- Working closely with the project architect, required drawings for the temporary door and fire-rated wall at the gift shop vestibule were completed within hours. This rapid response enabled the Division of Engineering & Buildings (DEB) to conduct an expedited review of permit revisions, and all necessary approvals have been secured.
- Exterior doors have received AARB approval, and the primary permit has been issued, allowing planned exterior improvements to move forward and supporting continued project progress.

Overall Status

Through proactive planning, rapid problem-solving, and close coordination among project partners, the project remains on schedule and well-positioned to minimize the impact of the lobby closure while maintaining strong momentum toward completion.

CAPITAL & MAINTENANCE RESERVE PROJECTS UPDATE

November 10, 2026

CAPITAL PROJECTS

Project Name	Budget	Status	Next Actions	Project Priority & Timeline
JS - Pier Shelter Expansion	$988,964	Working drawings are going through the DEB's approval process.	Publish construction RFP once final project approval is secured from DEB.	Priority 2
JS Café Redesign	$2.5 million	Detailed design completed Working drawings were returned to the Architect (AE) by DEB for revisions. Funding request is included in the FY28 capital budget request.	Complete DEB'S approval process Publish RFP for construction.	Priority 4 Awaiting funding decision.
Susan Constant Drydock	$5,786,357 ~~$4,470,000~~ Capital	Additional funding was secured to address extensive deterioration that was found on the vessel's below-waterline hull planking. Return of the vessel is delayed till fall of 2027.	-Continue work on the vessel.	Priority 1 On track for fall 2027 completion.

Project Priority Legend – *1 (Construction), 2 (DEB Approval), 3 (Design), 4 (Funding)*

CAPITAL & MAINTENANCE RESERVE PROJECTS UPDATE

November 10, 2026

CAPITAL PROJECTS – Page 2

Project Name	Budget/Source	Status	Next Actions	Project Priority & Timeline
Roof Replacements *Jamestown Settlement* *Emerson Central Support Center*	$8.6 million	In design	Owner, Architect (AE) & DEB meeting. AE and owner design review meetings.	Priority 3
Digital Media Studio	$850,000	Construction contract awarded Pending negotiations	Sign construction contract Project mobilization Determine construction dates Issue Notice to Proceed.	Priority 1
JS - Outdoor Lighting & Walkways	$2.5 million	Architectural and Engineering (AE) assessment completed. Environmental Survey and Utilities Mapping completed. AE predesign walkthrough completed Adopted a phased design approach.	AE to complete project design proposal AE walkthrough Begin project design.	Priority 3

Project Priority Legend – *1 (Construction), 2 (DEB Approval), 3 (Design), 4 (Funding)*

CAPITAL & MAINTENANCE RESERVE PROJECTS UPDATE

November 10, 2026

MAINTENANCE RESERVE PROJECTS

Project Name	Budget Allocation	Status	Next Actions	Project Priority & Timeline
JS – Lobby Flooring	$900,000	In Construction *Lobby closed on October 12 for construction.*	Anticipates construction completion by February 2027	Priority 1
JS Lobby Renovations	$827,037	In Construction *Lobby closed on October 12 for construction.*	Anticipates construction completion by February 2027	Priority 1
JS– Rotunda Restroom Renovations	$650,000	Working drawings completed and submitted. Returned by DEB with comments	AE is responding to DEB comments.	Priority 2

Project Priority Legend – *1 (Construction), 2 (DEB Approval), 3 (Design), 4 (Funding)*

CAPITAL & MAINTENANCE RESERVE PROJECTS UPDATE

November 10, 2026

MAINTENANCE RESERVE PROJECTS – Page 2

Project Name	Budget Allocation	Status	Next Actions	Project Priority & Timeline
Deferred Maintenance Projects *(See project list on the next page)*	$5.5 million	Completed AE project design walkthroughs	Awaiting AE design cost proposals	Priority 3
ADA Projects - ADA Doors & Push Buttons - Gallery Doors Replacement - Carpet Replacements	$359,622	Needs assessments completed. Project design walkthroughs completed	Awaiting AE design cost proposals	Priority 3

Project Priority Legend – *1 (Construction), 2 (DEB Approval), 3 (Design), 4 (Funding)*

Jamestown-Yorktown Foundation
BUILDINGS & GROUNDS COMMITTEE
November 10, 2026

FY2027 DEFERRED MAINTENANCE PROJECT LIST

November 10, 2026

			Design Assignments
1	ECSC – Front Window Replacement	$300,000	DJG, Inc.
2	ECSC – Water Heater Replacement (2)	$80,000	DJG, Inc.
3	JS – Generator Transfer Switch Replacements	$452,000	Procurement
4	JS Maintenance Bldg. – Generator Replacement	$30,000	DJG, Inc.
5	ARM-Y – Gallery Sliding Door Replacement	$90,000	DJG, Inc.
6	ARM-Y – Chiller Replacement	$350,000	DJG, Inc.
7	JS – Fire Suppression System Replacement	$2,850,000	Baskervill
8	JS – Gallery Roller Doors Replacement	$45,000	DJG, Inc.
9	JS – Boiler Replacement (2)	$510,000	Baskervill
10	JS Great Hall (Mall Side) Window & Door Replacements (portion of full envelope scope)	$700,000	Baskervill
11	Contingencies	93,000	
	TOTAL	**$5,500,000**	

Jamestown-Yorktown Foundation
BUILDINGS & GROUNDS COMMITTEE
November 10, 2026

FY2028 LEGISLATIVE CAPITAL BUDGET REQUESTS

JYF submitted a request for $10,172,372 in one-time FY2028 capital funding to address critical facility infrastructure, life-safety, accessibility, and deferred maintenance needs across its three campuses. This request builds upon the Commonwealth's $5.5 million FY2027 capital allocation, which is supporting remediation of the highest-priority deficiencies identified in JYF's 2025 Facilities Condition Assessment.

Of the total request, $8,510,317 is designated for capital renewal and infrastructure improvements, including replacement of failing HVAC systems; repair and replacement of deteriorated doors, windows, and building envelope components; parking lot rehabilitation; lighting upgrades to improve safety, visibility, and energy efficiency; and exterior painting to preserve facility assets.

The remaining $1,662,055 will support priority renovations at Jamestown Settlement to address ADA compliance and accessibility requirements, improve visitor circulation and traffic flow, and upgrade lighting and supporting infrastructure within the corridor connecting the lobby and café. Design for these improvements has been completed, allowing the project to proceed upon receipt of funding. Renovation elements specific to the café operation will be financed separately through enterprise funds administered by the Jamestown-Yorktown Educational Trust.

This investment will protect and extend the useful life of Commonwealth-owned assets, improve safety and accessibility for visitors and staff, and help ensure the continued operation and preservation of JYF's facilities.

Jamestown-Yorktown Foundation
BUILDINGS & GROUNDS COMMITTEE
November 10, 2026

FY2027 MAINTENANCE RESERVE BUDGET & PROJECT PLAN

(Action Required)

Proposed to the Buildings & Grounds Committee, November 10, 2026

Jamestown-Yorktown Foundation

FY2027 MAINTENANCE RESERVE BUDGET & PROJECT PLAN

FY2027 MAINTENANCE RESERVE BUDGET ALLOCATION			**$2,153,752**		
	Project Allocation at 07.01.2025	**Expended in FY 2026**	**FY2026 Balance at** 7.31.26	**FY2027 Allocation**	**Total Funds Available (TFA) - FY27**
MOE PROJECTS	**$459,925**	**$156,619**	**$303,306**	**$200,000**	**$503,306**
FACILITIES PROJECTS					
Jamestown Lobby Flooring (2024-2026)	$838,702	54,624	$784,078	235,434	$1,019,512
Jamestown Lobby Renovation Project	$927,037	$96,549	830,488	450,000	1,280,488
- Reimburse $600,000 advanced to Channel Dredging					
Jamestown Café Flooring				700,000	$700,000
Jamestown Rotunda Restroom Refresh	775,000	$4,321	$770,679	107,102	$877,781
Jamestown Ed Wing Restroom Refresh				$100,000	$100,000
Facilities Repairs			$66,789	261,216	$328,005
JS Water Fountain Repair - $100,000	100,000		$100,000		
Facilities Repairs Projects - $161,216	261,216	112,231	$148,985	100,000	$248,985
DAO Equipment Replacement	$120,000		120,000	150,000	270,000
ADA Improvements	$359,622		$359,622		$359,622
- Gallery Doors Replacement					
- Carpet Replacements					
- ADA Doors & Push Buttons					
Safety & Security Equipment Replacement	$50,000	$42,750	$7,250	50,000	57,250
TOTAL		**$467,094**	**$3,187,891**	**$2,153,752**	**$5,744,949**

Jamestown-Yorktown Foundation **Tuesday, November 10, 2026**
Board of Trustees **American Revolution Museum at Yorktown**
Marketing Committee **Classrooms A-B-C or Via Teams**
9:45 AM

Mrs. Anne Marie Morgan, Chair
Mrs. Ann Green Baise, Vice Chair
Delegate Jessica L. Anderson
Mr. David B. Botkins
Mrs. Barbara Hamm Lee*
Delegate M. Keith Hodges
Delegate Delores L. McQuinn
Mr. William L. Murray
Senator Thomas K. Norment, Jr.
Mrs. Lana T. Real
Professor James J. Wheaton
Liaison from JYF, Inc.

AGENDA

I. Call to Order – Mrs. Morgan

II. Approval of Minutes – Mrs. Morgan *(Action required)*
Wednesday, May 6, 2026
p. 41

III. VTC Statewide Strategic Tourism Plan 2026 – Caitlin Castainca Johnson, Director of Operations & Industry Initiatives, VA Tourism Corporation
p. 45

IV. FY 2028 Consumer Admission Pricing – Ms. Heikens *(Action required)*
p. 47

V. Fall & Winter Brand Advertising Campaign – Mrs. Turner
p. 49

VI. Board Engagement & Discussion – Mrs. Morgan
p. 50

VII. Other Business – Mrs. Morgan

VIII. Adjournment – Mrs. Morgan *(Action required)*

Committee Members Present:	Mr. David Botkins, Mrs. Gloria M. Chambers, Ms. Helen Zadarlik Cousins, *Liaison from JYF, Inc*., Delegate M. Keith Hodges, Delegate Delores L. McQuinn, Ms. Ann Marie G. Morgan
Committee Members Absent:	Ms. Jamie T. Burke
Other Board Members Present:	Chief Stephen R. Adkins Sr., Ms. Bentley R. Andrews, Ms. Ann G. Baise, Mrs. Mari Ann Banks, Mr. Bert H. Bateman, Jr. (via Teams), Ms. Fran C. Bradford, Mr. Thomas P. DiStanislao, Delegate Hyland F. Fowler, Jr. "Buddy", Mrs. Sue H. Gerdelman, Mr. Terry E. Hall, General Michael T. Harrison Sr., Mr. Charles E. James, Sr., Ms. Barbara Hamm Lee, Senator Mamie E. Locke, Senator Tommy K. Norment, Jr., Mrs. Helen B. Reveley, Secretary of Education Dr. Jeffrey O. Smith, Dr. Bill E. White
Other Guests:	Dr. Kate Maxlow (Senior Advisor to the Secretary of Education in the Office of the Governor)
JYF Staff Present:	Ms. Christy Coleman, Ms. Makalya Embry, Mr. Brian Forrester, Ms. Sarah Haendler (via Teams), Mr. Michael Klimenko (via Teams), Ms. Lianne Koch, Dr. Mariruth Leftwich, Ms. Lisa Lucas, Dr. Juliet Machie, Mr. Coy Mozingo, Mr. William Nixon, Ms. Kendall Schoonover (via Teams), Mrs. Melissa Thompson, Mrs. Glenda Turner, Ms. Meghan van Joosten

I. Call to Order

Mrs. Chambers called to order the Wednesday, May 6, 2026, meeting of the Jamestown-Yorktown Foundation (JYF) Marketing Committee at 2:45 p.m. at Jamestown Settlement with some other participants joining by Microsoft Teams conference in accordance with Virginia Code § 2.2-3708.3. Roll was taken, and a quorum of committee members was confirmed to be present in person.

II. Approval of Minutes

Mrs. Chambers referred members to the minutes of the November 12, 2025 meeting. Ms. Morgan made a motion for approval, which was seconded by Mr. Botkins. The motion passed unanimously.

III. Opening Remarks & Meeting Framework

Mrs. Chambers stated that today's meeting would look a little different. She explained the presentation would not just report and walk through the numbers, but bring you inside Marketing & Public Relations' strategies and explained why they're doing it. She mentioned when board members understood the "why", they became JYF's amplifiers. Mrs. Chamber also mentioned that towards the end of the meeting there would be further discussion.

IV. Outlander Exhibition: Converting Fandom into Visitation

Mrs. Turner began by talking about the large pre-existing fan base for not only Diana Gabaldon's books but also the popular tv show that premiered its final season on March 6. She talked about the tickets sold (over 10,574) and redeemed (over 9,111), but also the success of JYF's media day with special guest, actor John Bell, as well as the media coverage this exhibit had garnered for the museum including Smithsonian.com. Another success was the feedback fans and visitors had left on social media. JYF's audience was not only fans of the books or show but also historical clothing in general. One example was a couple who came to see the Outlander exhibit and once here saw the Yorktown area as well. Mrs. Turner concluded that this was a marketer's dream. She stated that authentic experiences for already engaged audiences drove attendance, word-of-mouth and loyalty.

V. Virginia 250: Positioning JYF at the Center of History

Next Mrs. Turner talked about how some museums reenacted history, while JYF's museums lived it. She remarked that JYF's two museums placed us at the heart of the commemoration narrative. Mrs. Turner stated that there had been over 8,000 views of JYF's Virginia 250 page on the website and over 30 TV broadcast and news features that drove awareness. The combination of the Virgina 250 and JYF's museum logos had been combined for use on brochures, in media kits, emails, flyers, social media and paid advertising. The page on JYF's website dedicated to America's 250th promoted JYF's museums, special exhibits, rare artifacts as well as merchandise and other events. It also

contained links to the VA250 website and the Passport, which promoted visits to not only JYF's museums but Virginia's other premier historical attractions. Mrs. Turner mentioned JYF's involvement as one of the locations for the filming of Ken Burn's "The American Revolution", including footage of JYF's ships. Also mentioned were the Regional Civics Bee at Jamestown Settlement and the upcoming opening of JYF's special exhibit "Give Me Liberty: Virgina and the Forging of a Nation". Mrs. Turner concluded with the "Why" question and she said the answer was simple: this is where the story began and where it came to life.

VI. Reaching New Audiences: Our Growth Strategy

Mr. Forrester, Advertising and Marketing Manager, reported on JYF's audiences and the strategies used. He talked about JYF's two main audiences: out-of-state and locals which included the Commonwealth of Virginia, DC and JYF's hyper-locals. For out-of-state, the methods used were both digital, such as Facebook, Instagram and Google Search ads and traditional marketing, such as email campaigns, press releases, sales conferences, organic social media and print ads. For the locals JYF wanted repeat visitation throughout the year and the same strategy as the out-of-states was used but handled geographically. Mr. Forrester mentioned the use of digital billboards on the I-64 corridor as well as local WATA buses. More money was spent during the summer months to capture the visitors in Williamsburg.

VII. Measuring What Matters: Strategy to Results

Next Mr. Forrester talked about JYF's message and strategy. He spoke about the process they had of convening a diverse group of JYF staff together to brainstorm ideas for a new message, the process and the result: five that have been used but one that was the winner. Two Museums. Endless Discovery. Mr. Forrester stated that you saw these phrases on those billboards along I-64. The same strategy was used for advertising the special exhibitions. He showed examples of these phrases on billboards, WATA bus wraps and print/digital ads. These method's results were reviewed over and over: people clicking, visiting pages, commenting on social media. Clear messaging equaled conversions.

VIII. Board Engagement & Discussion

Mrs. Chambers opened the floor for discussion about where we can extend and strengthen this work. Board members of whether I-95 was a possible avenue to extend advertising to Northern Virginia. Some board members also said that when asked about 250, they directed individuals to

JYF's website. Other questions and discussions focused on the messages and attracting visitors to the museums. JYF emphasized the living history, touch, feel, experience that we offer to all ages. Also mentioned was JYF's presence on social media and the growing popularity of JYF's YouTube channel. Children engagement can be hard to gauge so sometimes it was gained through parents, or JYF's children's workshops or educational outreaches. Another part of the discussion was marketing targeted at not just local high schools, but college students, who could be locals or out-of-state students who may not have visited JYF's museums or knew a lot about Virginia history. For adults, bridge the gap between kids who came for school trips to parents or grandparents that came back with the child. Marketing that brought the families to enjoy a vacation stress-free or new people to the area who didn't not know what we have to offer.

IX. Adjournment

There being no further business, Mrs. Chambers called for a motion to adjourn the meeting. Ms. Morgan made a motion, which was seconded by Delegate McQuinn and approved by all. Mrs. Chambers officially adjourned the meeting at 3:48 p.m.

VIRGINIA IS FOR LOVERS

Coastal Virginia:

Hampton Roads

Jamestown-Yorktown Foundation
VTC STATEWIDE STRATEGIC TOURISM PLAN 2026



STATE OF THE REGION

2024 Annual Economic Impact

From Atlantic beaches and waterfront cities to the Historic Triangle, Hampton Roads brings together coastal recreation, nationally significant history and major attractions. Virginia Beach, Norfolk and Williamsburg anchor a diverse visitor experience, while surrounding rural communities add waterways, agritourism and small-town character.

$7.0B	54.26K	$2.0B	$215.7M	$350.0M
Total Direct Spending	Total Employment Jobs	Total Labor Income	Total State Taxes	Total Local Taxes

STRENGTHS

ARTS & CULTURE

Colonial Williamsburg • Jamestown and Yorktown • Fort Monroe • Chrysler Museum of Art and Mariners' Museum and Park • Major performing arts venues

ENTERTAINMENT | ATTRACTIONS & GAMING

Busch Gardens Williamsburg • Hampton Coliseum, Scope Arena, and live music venues • Virginia Aquarium, Norfolk Botanical Garden, and Virginia Zoo

AUTHENTIC ARCHITECTURE & PUBLIC PLACES

Virginia Beach Boardwalk • Norfolk Waterside District • Colonial Williamsburg and waterfront towns • Walkable districts, shopping, and coastal public spaces

WEAKNESSES

Bridge-tunnel congestion limits cross-region trips • Weak transit links between visitor hubs • Group travel and multi-stop itineraries face added delays and costs

OPPORTUNITIES

CONVENTIONS & CONFERENCES

Major convention venues lack an attached headquarters hotel • 500-room hotel and expanded meeting capacity could attract larger events

SPORTS | ENTERTAINMENT

Centralized tournament facilities • Renovate aging Hampton Coliseum and Scope Arena • Add flexible midsized venues

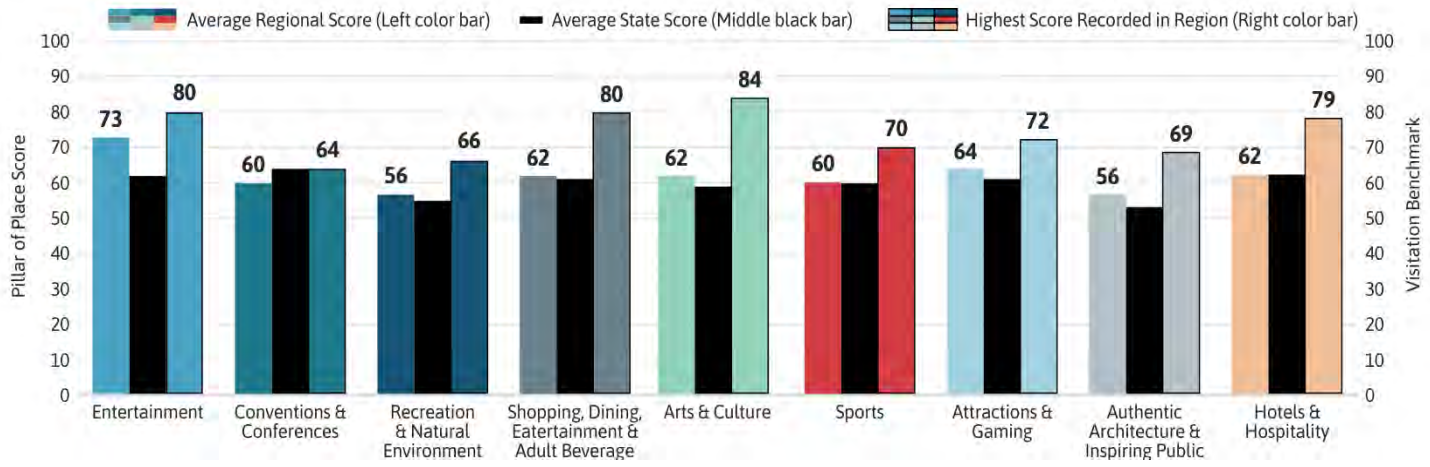
HOTELS & HOSPITALITY

Boutique and lifestyle hotels in historic and waterfront settings • High-end lodging gaps beyond established resorts • New Kent, Surry, and Charles City offer additional opportunities for hotels and hospitality

THREATS

Strong competition from Outer Banks, Wilmington, and Chattanooga for coastal and event visitors • Beach seasonality • Coastal weather disruptions

PILLARS OF PLACE – REGIONAL ASSET PERFORMANCE



Hampton Roads has standout attractions and cultural assets across several pillars. The assessment identifies opportunities to strengthen the depth and performance of Sports, Entertainment, and Conventions & Conferences.

VIRGINIA IS FOR LOVERS

Coastal Virginia: Hampton Roads

SCAN HERE TO ACCESS THE STP

vatc.org/STP

AUDIENCE PROFILES

C BOOMING WITH CONFIDENCE

Established couples and families
Value comfort, quality and shared experiences
Enjoy outdoor, cultural and family-oriented trips

O SINGLES AND STARTERS

Younger, socially active and digitally connected adults
Seek lively, accessible experiences
Enjoy events, dining and local attractions

D SUBURBAN STYLE

Established suburban families and couples
Value convenience, comfort and time together
Enjoy family attractions and easy, shared outings

COMPETITORS

Outer Banks & Wilmington Area, North Carolina • Chattanooga & Smoky Mountains, Tennessee

WHAT MAKES THE REGION UNIQUE

The mix of Atlantic beaches, nationally significant historic sites, major attractions and maritime culture gives Hampton Roads an experience few coastal competitors can match. Its urban destinations and rural waterfront communities offer opportunities for varied, multi-stop trips.

REGIONAL PRIORITIES

SPORTS | ATTRACTIONS & GAMING

Virginia Beach Sports Center, Hampton Aquaplex, Boo Williams Sportsplex, and Busch Gardens draw families and events. Yet scattered facilities and full outdoor complexes limit major tournaments. Centralized indoor and outdoor venues could win larger events and longer stays.

HOTELS & HOSPITALITY | CONVENTIONS

The Virginia Beach Convention Center and Hampton Roads Convention Center have meeting demand but lack a true attached headquarters hotels. A 500+ room full-service property and more boutique stays near historic, and waterfront districts would strengthen group and premium leisure travel.

ENTERTAINMENT | ARTS & CULTURE | SHOPPING, DINING, EATERTAINMENT & ADULT BEVERAGE

Colonial Williamsburg, museums, waterfront dining, and major venues already anchor diverse trips. Aging arenas and gaps in smaller event spaces limit premium acts and programming; upgrades, urban venues, and rural cultural events can spread visits across the region.

RECREATION & NATURAL ENVIRONMENT

From Atlantic beaches to inland rivers and the Virginia Capital Trail, Hampton Roads can connect outdoor experiences and encourage visitors to explore beyond its major tourism hubs.

TACTICAL RECOMMENDATIONS

SPORTS

- Study location, size, and partners for regional sports complexes
- Plan an outdoor complex with 12+ turf fields or ball diamonds
- Build indoor tournament capacity; leverage Greater Williamsburg Sports & Event center

ENTERTAINMENT

- Modernize Hampton Coliseum and Scope Arena
- Upgrade acoustics, seating, production, and hospitality amenities
- Add flexible small/midsized venues in urban centers

HOTELS & HOSPITALITY

- Pursue 500-room headquarters hotel linked to convention space
- Include 40,000–50,000 sq. ft. ballroom and meeting space
- Grow boutique lodging in historic, waterfront, and rural areas

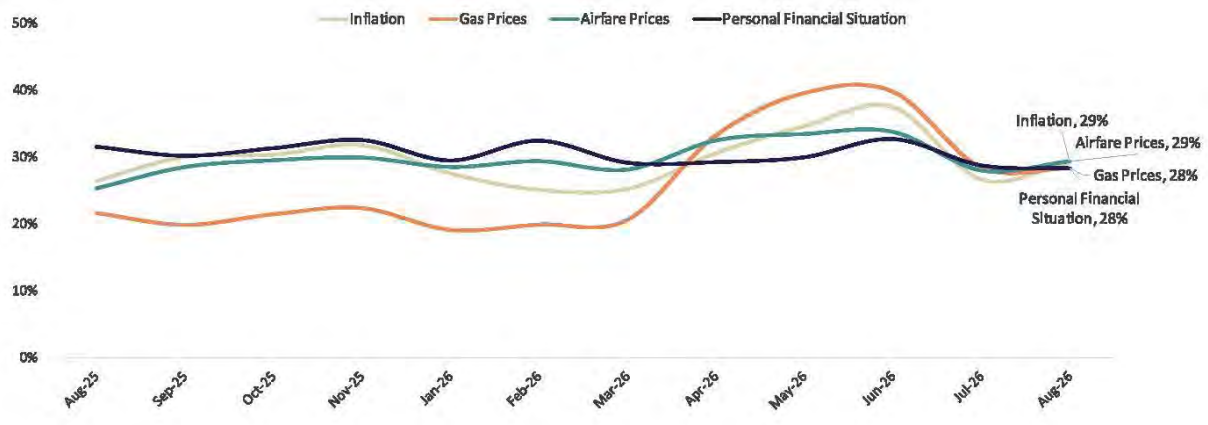
Jamestown-Yorktown Foundation
FY 2028 CONSUMER ADMISSION PRICING



Concerns Impacting Travel Decisions

Concerns Impacting Your Travel Decisions in the Next Six Months

The chart shows the percentage of respondents who rated each factor as "Greatly impact" their travel plans (a 5 on a 1–5 scale) over the period from August 2025 to 2026.

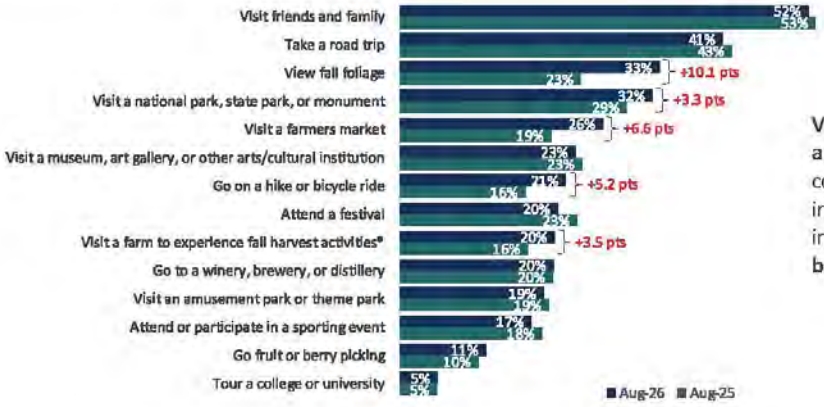


Source: Longwoods International ATS Wave 110
Percentages are based only on respondents who are confirmed travelers and intend on traveling in the next six months

Longwoods INTERNATIONAL | miles PARTNERSHIP

Visiting Friends and Family and Road Trips Remain Top Fall Activities

Which of the following activities are you planning to participate in during your fall trip(s)?



Visiting friends and relatives (52%) and taking a road trip (41%) continue to be the top activities of interest this fall. However, there is an increased interest in **more outdoor-based activities** compared to last fall.

*Corn maze, hay rides, pumpkin patch, etc.

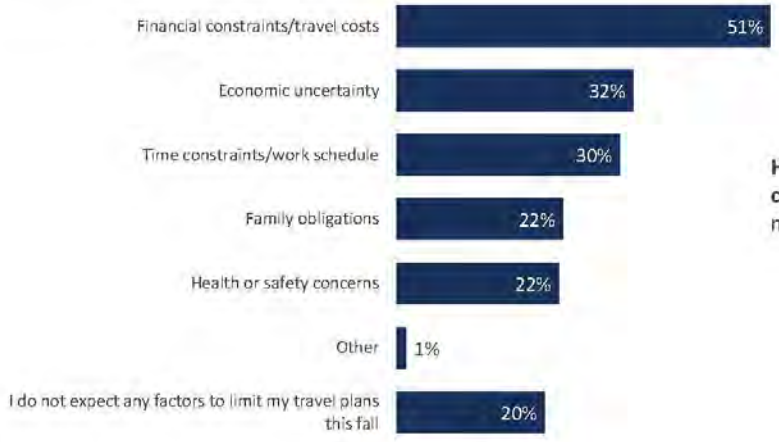
Source: Longwoods International ATS Wave 110

Percentages are based only on respondents who are confirmed travelers and plan on taking a leisure trip this fall

Longwoods | miles

Financial Constraints/Travel Costs May Limit Fall Travel

What factors, if any, may limit your travel plans this fall?



Half of travelers (51%) cite **financial constraints/travel costs** as a factor that may limit their fall travel plans.

Source: Longwoods International ATS Wave 110

Percentages are based only on respondents who are confirmed travelers and plan on traveling this fall

Longwoods | miles

Jamestown-Yorktown Foundation
FY 2028 CONSUMER ADMISSION PRICING

The following information provides a ten-year history of admission rates at Jamestown Settlement and the American Revolution Museum at Yorktown.

ADMISSION RATE HISTORY ($)						
Year	Jamestown Settlement		American Revolution Museum at Yorktown		Jamestown Settlement / American Revolution Museum at Yorktown	
	Adult	Youth	Adult	Youth	Adult	Youth
2017	17.00	8.00	12.00	7.00	23.00	12.00
2018	17.00	8.00	15.00	7.50	25.50	12.25
2019	17.50	8.25	15.00	7.50	26.00	12.50
2020	17.50	8.25	15.25	7.75	27.50	13.50
2021 & 2022	18.00	9.00	16.00	8.00	28.90	14.45
2023 & 2024	18.00	9.00	18.00	9.00	30.00	15.00
2025 & 2026	20.00	10.00	20.00	10.00	34.00	17.00
2027	21.00	11.00	21.00	11.00	34.00	17.00

2028 ADMISSION RATES ($)					
Jamestown Settlement		American Revolution Museum at Yorktown		Jamestown Settlement / American Revolution Museum at Yorktown	
Adult	Youth	Adult	Youth	Adult	Youth
21.00	11.00	21.00	11.00	34.00	17.00

- Processing fee (new in FY27):
  - 2.3% applied to credit card and debit card transactions
  - No fee for ACH or cash
- $1.00 discount for Military, AAA, Senior (single-site tickets only).
- Rates take effect July 1, 2027, for Fiscal Year 2028.
- *Based on other area attractions and current economy, pricing recommendations are aligned with industry norms. FY 28 proposed rates would remain the same: single-museum adult $21 and youth $11. The combo ticket would continue to offer a strong incentive—essentially rewarding visitors for experiencing both both-museums at $34 for adults and $17for youth.*

Jamestown-Yorktown Foundation
FALL & WINTER BRAND ADVERTISING CAMPAIGN

Fall/Winter Evergreen Advertising Creative

3 funnel stages	**3** target segments	**13** tailored messages	**16** creative images

STAGE 1
Top of Funnel

Reach

Make the introduction to people who don't have us on their radar yet.

Button: Learn More



OUT OF STATE

Get the Inside Story



VIRGINIA

Lean Into Virginia History



LOCAL

See What Pulls You In



LOCAL

Experience the Past Up Close

STAGE 2
Mid Funnel

Traffic

Invite a click to explore the website. A six-frame carousel runs in every market.

Button: Learn More or Book Now



ALL 3

Two Museums. Endless Discovery.



OUT OF STATE

Get Closer to Our Past



OUT OF STATE

See How the Past Unfolded



VIRGINIA

Take a Walk in Their Shoes



LOCAL

There's More to the Story



STAGE 3
Bottom Funnel

Retargeting

"Plan Your Visit: Get Your Tickets Today" goes to out-of-state and Virginia visitors who've already been to our website.

Book Now

How we'll measure it

September 2026 benchmarks to beat

Reach: cost per 1,000 impressions	**$2.27 to $2.64**
Traffic: cost per landing page view	**$0.62 to $0.69**

Sources: Davis creative concepts (Oct. 15, 2026) and monthly reporting (Oct. 8, 2026)

JYF Board of Trustees **Tuesday, November 10, 2026**
Public Programming Committee **American Revolution Museum-Yorktown**
Classrooms A-B-C **11:00 AM**

Delegate Betsy Carr, *Chair*
Professor Ervin Jordan, Jr. *Vice Chair*
Chief Stephen Adkins, Sr.
Ms. Bentley Andrews (Inc. Liaison)
Delegate Jessica Anderson
Mrs. Ann Green Baise
Delegate Gretchen Bulova
Mr. Ben Dendy III
Ms. Suzanne Flippo
Mrs. Sue Gerdelman
Delegate Alfonso Lopez
Mrs. Anne Marie Morgan
Mrs. Lana Real
Delegate Shelly Simonds

AGENDA

I. Call to Order – Delegate Carr

II. Approval of Minutes: – Delegate Carr
Wednesday, May 6, 2026 *(Action Required)*
p. 53

III. The Value of History Museum Experiences – Dr. Leftwich
p. 59

IV. Learning and Community Engagement – Ms. Meyer

A. Learning Update
p. 62

B. Select 2026 – 2027 Public Programs
p. 65

V. Special Exhibitions – Dr. Leftwich and Mr. Henline

A. Special Exhibitions Road Map

B. “A Good and Just Peace?”: Legacies of Virginia Tribal Sovereignty

VI. Curatorial Review – Mr. Hoilman

A. Semi-Annual Acquisitions Report (*Action Required*)
p. 69

B. Semi-Annual Conservation Report
p. 74

VII. Collections Management Policy Revisions – Dr. Leftwich
p. 75 *(Action Required)*

VIII. Yorktown Gallery Updates – Mr. Hoilman

IX. Other Business – Delegate Carr

X. Adjournment – Delegate Carr *(Action required)*

Members Present:	Abbitt, Adkins, Andrews, Baise, Banks, Cousins, Gerdelman, Hall, Harrison, McQuinn, Morgan, Simonds, White,
Members Absent:	Burke, Carr, Dendy, Flippo, Pinnock, VanValkenburg.
Others Present:	Botkins, Bradford, Cox, Diggs, DiStanislao, Hamm-Lee, Locke, Reveley, Kate Maxlow, Senior Advisor to the Secretary of Education.
Staff Present:	Coleman, Floyd, Henline, Hoilman, Leftwich, Lucas, Machie, Meyer, Mozingo, Nixon, Perkins, Speth, Stewart, Thompson, Turner, Van Joosten

I. Call to Order

Ms. Andrews called the Wednesday, May 6, 2026, joint meeting of the Jamestown-Yorktown Foundation Public Programming Committee and the Jamestown-Yorktown Foundation, Inc., Acquisitions Committee to order at 4:07 p.m. in the classrooms of Jamestown Settlement. She welcomed all attendees and requested that Ms. Floyd call the roll. Quorum was established for both committees.

Ms. Andrews noted that Dr. Leftwich would help chair the joint meeting, filling in for Delegate Carr who was unable to attend.

II. Approval of Minutes

Ms. Morgan made a motion for approval of the minutes from the Wednesday, November 12, 2025, Public Programming Committee meeting, and with a second by Delegate Simonds, the motion was approved unanimously.

Dr. White made a motion for approval of the minutes from the Tuesday, October 7, 2025, Acquisitions Committee meeting. The motion was seconded by Mrs. Abbitt and approved unanimously.

III. Special Exhibitions

Ms. Andrews observed that last year was a standout year for special exhibitions and noted that this year is shaping up to be just as exciting. She invited Dr. Leftwich to tell committee members more about the special exhibitions.

Dr. Leftwich began by describing how JYF was contacted by Sony Pictures Television in November 2025 about the possibility of hosting an exhibition of costumes from the popular *Outlander* series, specifically 27 distinct costumes from seasons 1 – 4 of the show. Because the exhibit opening was

timed to coincide with the airing of the 8th season finale of the show in March 2026, she joked that the title of the exhibition should be *Outlander: Costumes Woven in "Very Little" Time* and praised the Curatorial, Exhibitions, and Visitor Experience staff who worked hard to bring the exhibition to fruition in a short timeframe. She reported that to date, over 10,750 tickets have been sold with visitors traveling from 42 states, including Alaska. Although the exhibit closes on May 18 to make way for *Give Me Liberty*, she indicated that Sony views it as a pilot for a possible traveling exhibition concept.

Dr. Leftwich emphasized that, despite the serendipity that led to *Outlander*, she and the Curatorial and Exhibits team will be working over the next few months to determine a five-year exhibition schedule with a focus on audience, impact, and partnerships. She indicated that a survey will be conducted of key groups, including board members, to determine interests.

Dr. Leftwich invited Mr. Henline, Curator of Indigenous History & Culture, to tell committee members about two additional upcoming special exhibitions. Mr. Henline began by describing *Give Me Liberty: Virginia and the Forging of a Nation,* the joint exhibition between JYF and the Virginia Museum of History and Culture which ran at the VMHC from March 2025 until January 2026. It is now scheduled to open at the American Revolution Museum at Yorktown on July 1, 2026. Mr. Henline noted that the exhibition features Indigenous people, free and enslaved Blacks, and white people of all walks of life, in addition to important historical figures of the Revolution. It will run through January 31, 2027.

Mr. Henline also discussed *A Good and Just Peace?: 350 Years of Treaties, Broken Trust, and Tribal Sovereignty* which will open at Jamestown Settlement in May 2027 in conjunction with the 350th anniversary of the Treaty of Middle Plantation. He stressed that the exhibition will begin in the present, with the current state of Virginia tribes, and that JYF will work closely with all recognized tribes as co-curators.

IV. Learning and Community Engagement

Moving to the next agenda item, Ms. Andrews then invited Ms. Meyer, JYF's Director of Learning and Community Engagement, to provide a Learning Program update and a review of select 2026 Public Programs.

Ms. Meyer reported that in FY25, JYF served 156.368 individuals onsite along with 41,805 through classroom outreach and distance learning. She also noted that for the remainder of FY26, 151,246 individuals have been booked and served along with 36,291 outreach students. She observed that reductions in classroom outreach numbers are largely due to continued increased costs, challenges in maintaining and attracting staff, and inclement weather. For the coming year, she indicated a renewed focus on reaching schools within a two-

hour radius of JYF, as well as success with grant applications to the Cameron and Blocker Foundations that will help JYF meet its service goals in Hampton Roads and the Tri-cities region.

To better support a growing number of self-guided groups booking visits at both sites, Ms. Meyer described adjustments to operations such as early access for Virginia schools to book guided tours, standard operating procedures to orient and support self-guided students, and plans to establish education stations throughout galleries and living history areas. She reported on new and continuing initiatives including an updated Yorktown Guided Tour, classroom resources developed by the Teacher Programs team, and numerous public programs and events being offered through the Community Engagement team.

V. Maritime Program Update

Ms. Andrews turned to the Maritime Program Update, inviting Captain Speth to tell committee members more about the *Godspeed* voyages planned for 2026, and to update them on the status of the *Susan Constant* restoration project.

Captain Speth described *Godspeed's* upcoming participation in Sail250 voyages to Yorktown and Norfolk. He reported that the ship will depart Jamestown on June 10 for Yorktown, participate in Tall Ships Parade on June 12, and be open to the public from June 12 – 14. From June 16 – 18, the ship will voyage to Norfolk with stops in Mathews County and Virginia Beach. *Godspeed* will then join other tall ships for the parade into Norfolk on June 19. It will remain open to the public in Norfolk through June 22, departing on June 23 and arriving back at Jamestown Settlement on June 24.

Regarding the *Susan Constant* restoration project, Captain Speth indicated that the shipwrights at Mystic Seaport Museum shipyard had been making great progress. Unfortunately, he shared that they discovered considerable deterioration in the full planking and framing below the waterline. This means that the project schedule has been revised and a repair plan and change order are being developed in accordance with best practices and Coast Guard repair standards. He reported that the additional estimated cost is $1.2 million and the return of the ship is delayed by one year.

Discussion ensued with Ms. Gerdelman inquiring whether the deterioration is ordinary? Captain Speth indicated that it is very unusual but he pointed out that doing the repair work now will extend the service life of the ship by 25 years.

VI. Religion and Early America Initiative Update

Following the Maritime Update, Ms. Andrews next invited Dr. Leftwich to "switch hats" from co-chair to presenter and update the committees on JYF's "Religion and Early America" initiative.

Dr. Leftwich indicated that there are now three distinct Lilly Endowment funded projects and highlighted their completion timelines: Lilly I (January 2028); Lilly II (April 2029), and Lilly III (Summer 2027). As reported previously, she indicated that the Lilly Phase I grant is supporting changes to the Core Galleries and Living History areas at both museums, while Lilly Phase II will support changes to the Jamestown introductory Indigenous and African galleries. She observed that Lilly Phase III, ironically, will be the first completed Lilly project. It is supporting the development of an iCivics interactive game and teaching resources, as well as the delivery of two 12-day "Religious Freedom Trail" Summer Teacher Institute trips through New England, Philadelphia, and Williamsburg for 30 teachers. Lilly III will be completed in the summer of 2027.

Dr. Leftwich also reported that the second biennial Lilly-supported symposium will take place at the American Revolution Museum at Yorktown on May 29 and 30, 2026. Titled "Awakening Dissent: Religion, Revolution, and Legacy," it will feature scholars including the acclaimed author and public historian Jemar Tisby. She noted that about 80 people have already registered for the symposium.

Finally, Dr. Leftwich shared with committee members that JYF received the Greater Williamsburg National Day of Racial Healing 2026 Table Builder Award that recognizes Williamsburg organizations who are "building bigger tables to correct historical narratives, foster truth-telling, and promote community collaboration."

VII. Curatorial Review

Ms. Andrews then turned to the Curatorial Review, the portion of the meeting concerned with the conservation, acquisition, and borrowing of artifacts. She invited Mr. Hoilman, Director of Exhibition and Curatorial Services, to take the floor.

Mr. Hoilman reported on two conservation projects undertaken between July 1 and December 31, 2025: (1) the annual condition assessment of the thirty-three African artifacts featured in Jamestown Settlement galleries on loan from the Mercer Museum, and (2) the conservation of JYF's Pattern 1805 Cavalry Saddle for long-term exhibition at the American Revolution Museum at Yorktown.

He indicated that during the same reporting period, although there were no new acquisitions, JYF, Inc. continued the phased procurement of the Charles Peale Polk portrait of George Washington. Also in this timeframe, he noted that JYF Registrars compiled and submitted documentation to TACOM, an agency of the U.S. Army, for the long-term loan of two 18th-century howitzers surrendered by Cornwallis at the Battle of Yorktown in 1781 and previously displayed at William & Mary.

Mr. Hoilman also reported on the work of the Curatorial team to manage loans for both permanent galleries and special exhibitions, pointing out that 81 artifacts were managed from 21 lenders during the reporting period.

Mr. Hoilman concluded by sharing the proposed FY2027 Annual Acquisitions Plan. He reviewed the plan priorities including: Religion in Early America (Lilly Phase I), Ways of Being (Lilly Phase II), the special exhibition *A Good and Just Peace?*, Cultural Connections focused on the Indigenous Peoples Program with NAGPRA compliance, and Commemorating America at 250.

Following Mr. Hoilman's presentation of the plan, on behalf of the Acquisitions Committee, MG Harrison moved to endorse for approval the proposed FY2027 Annual Acquisitions Plan. With a second by Mrs. Banks, the motion passed unanimously.

On behalf of the Public Programming Committee, Chief Adkins moved to recommend the proposed FY2027 Annual Acquisitions Plan for approval by the Board of Trustees. With a second by Delegate Simonds, the motion passed unanimously.

Ms. Andrews then proceeded to the last section of the Curatorial Review, an update on JYF's efforts to comply with the Native American Graves Protection and Repatriation Act (NAGPRA). She reminded committee members that, with support from the Lilly Endowment grant, JYF was able to hire a NAGPRA Coordinator who began work in December 2025. She invited Mr. Henline to introduce Mr. Basil Stewart who is now stewarding the process of ensuring NAGPRA compliance for JYF's Indigenous collections.

Mr. Henline emphasized that Mr. Stewart has been part of a NAGPRA community of practice for a number of years. He also reported that there are 60 tribes currently involved in JYF's NAGPRA compliance process. Mr. Stewart reported that over the last five months, he has reviewed and compiled information on collections. He is currently initiating consultation with Native Nations interested in the thirteen states represented by JYF collections. Consultation will identify which items are NAGPRA eligible, affiliation with Native Nations, whether Native Nations are interested in repatriation, and consent for exhibition and research.

VIII. Other Business

Ms. Andrews called for any other business. Dr. Leftwich acknowledged her staff's efforts and the exciting work everyone is undertaking.

IX. Adjournment

There being no other business, Dr. White motioned for adjournment, and following a second by Mrs. Abbitt, Ms. Andrews adjourned the Wednesday, May 6, 2026, joint meeting of the Public Programming and Acquisitions Committees at 5:28 p.m.

Jamestown-Yorktown Foundation
THE VALUE OF HISTORY MUSEUM EXPERIENCES
Institute for Learning Innovation Study Results

Measuring the Societal & Economic Value of History Museum Experiences

John H. Falk
Lynn D. Dierking
Nicole Claudio
Elysa Corin
Institute for Learning Innovation
October 3, 2025

EXECUTIVE SUMMARY

This project was an effort to rigorously document the societal, well-being-related value as well as the resulting economic value and cost-benefits created by general public visits to sixteen U.S. museums – American Revolution Museum at Yorktown, Atlanta History Center, Aurora Regional Fire Museum, Billings Farm & Museum, Conner Prairie, Corpus Christi Museum of Science & History, James H. Hill House, Jamestown Settlement, Mill City Museum, Missouri History Museum, Minnesota History Center, Minnesota State Capitol, National WW1 Museum & Memorial, Sauder Village, South Carolina State Museum, and Taliesin West (Frank Lloyd Wright Foundation).

Museums create value by catalyzing feelings of wonder, interest, curiosity, enhanced understanding, greater sense of belonging and perceptions of physical safety and serenity. Museums have long been successful when it comes to supporting these very basic, biologically and culturally valuable human needs, needs that can be described as falling within the four primary dimensions of human well-being – Physical, Social, Intellectual and Personal Well-Being. Until recently, efforts to directly measure and quantify the value created by museums when satisfying these basic human needs has been difficult.

In 2024, a total of 6,850 museum visitors from across these sixteen museums were approached and invited to participate in this study. Of these, 75%, or 5,163 individuals agreed to participate, and of these, 26%, or 1,366, fully completed a survey they received one month after their museum visit. Respondents were randomly assigned one of two surveys. One survey asked visitors to rate the degree of well-being they experienced as a consequence of their museum visit by asking them to indicate whether or not they had experienced each of 16 possible well-being-related outcomes – 4 outcome measures for each of the 4 dimensions of well-being, and if they had experienced enhanced well-being, for how long those benefits lasted – benefits lasted 1-2 hours, a day, a week, two weeks, or a month or more.. The other survey asked individuals to assign a monetary value to each of the same set of 16 possible well-being-related outcomes for each of the five above durations.

For each of the 16 outcome measures, virtually all visitors (99+%) indicated receiving some benefit from their museum experience, and most individuals (98%) reported multiple benefits lasting one or more days, with many reporting benefits lasting weeks or even a month or longer. Average durations of benefits were over a week for Social, Personal, and Intellectual Well-Being and about a half a week for Physical Well-Being, which even though much less than the other dimensions of well-being still represented a significant duration of benefit for a couple hour museum visit. Though all visitors enjoyed benefits from visiting these sixteen history museums, individuals with a Professional/Hobbyist visit motivation enjoyed significantly greater benefits – a finding with practice implications.

Each of the four dimensions of well-being were perceived to have had significant economic value, with Personal Well-Being having the greatest perceived value ($339) and Physical Well-Being the least ($182). However, the full value of these museum experiences was greater than any of these individual values alone since nearly all visitors experienced benefits across all four dimensions of well-being. It was estimated that the overall economic value of visiting a museum was in the range of $544 - $1,087 per person, or to be conservative, **a value of $544/person/visit**.

Although an economic value of $544/person/visit is truly impressive, being more than an order of magnitude greater than the market costs of a typical history museum visit, the real value created by these and other U.S. history museums is much greater. Tens to hundreds of thousands of individuals visit each of these museums every year, resulting in a **collective economic value exceeding $100 million/museum/year**. Ultimately, though, value cannot be judged merely by the gross benefits created since it takes money to create this value. A cost-benefit analysis showed that the average ratio of benefits created relative to the costs of creating that value was equal to more than **$7 of benefit achieved for every $1 spent**.

In conclusion, this study demonstrated that each of these sixteen history museums cost-effectively delivered significant personal, intellectual, social, physical, and economic value to their users, and through their users, each delivered significant societal and economic value to their community.

Institute for Learning Innovation

Jamestown-Yorktown Foundation Additional Questions Below are summaries of additional, museum-specific questions asked.

Table B10. *To what* extent does each statement describe why YOU visited the Jamestown-Yorktown Foundation a month ago (on a scale of 1-7 with 1 being not at all like me and 7 being very much like me):

	1	2	3	4	5	6	7	Avg
I am generally interested in American history.	2%	1%	3%	3%	21%	19%	50%	6.0
I am specifically interested in early American history.	2%	2%	8%	17%	22%	19%	30%	5.3
This is an important historical place to visit in America.	1%	1%	0%	0%	17%	22%	58%	6.3
I enjoy visiting historical places with my family/friends.	2%	1%	0%	4%	14%	19%	58%	6.2
I love history and when I travel, I try to visit historical places in the area.	1%	2%	4%	10%	10%	14%	57%	6.0

Table B11. Rate how much each of the following elements added to your recent museum experience at the Jamestown-Yorktown Foundation a month ago (on a scale of 1-7 with 1 being not at and 7 being very much):

	1	2	3	4	5	6	7	Avg
Seeing authentic historic objects and documents in museum galleries	1%	1%	1%	3%	16%	19%	59%	6.2
Exploring audio and video interactives in museum galleries	3%	6%	4%	9%	26%	17%	34%	5.4
Experiential, 4-D theater experiences (Bacon's Rebellion at Jamestown, Siege Theatre at Yorktown)	7%	3%	4%	12%	18%	13%	41%	5.4
Seeing re-created historic structures	0%	2%	1%	6%	14%	14%	61%	6.2
Interacting with costumed living history interpreters	3%	1%	8%	4%	14%	17%	52%	5.8

Table B12. What are the most important ways that history museums should engage you with their content?

	%
Helping me gain deeper understanding or new knowledge from up-to-date research and objects from the past	50%
Exposing me to multiple sides of history and the past	51%
Creating spaces to talk about history and the past	21%
Creating spaces to talk about contemporary/present-day history	7%
Making connections that show how history is relevant to the present day	56%
Presenting the facts and letting me make up my own mind to reach conclusions	39%
Challenging me to think about things in new ways, even if it is uncomfortable	33%
Promoting democracy and civic engagement in communities	26%
Including multiple sides of stories typically excluded from history	42%
Gaining a better understanding of others	26%

Jamestown-Yorktown Foundation
LEARNING AND COMMUNITY ENGAGEMENT
Learning Update

Learning:

- **Reservations and Bookings:** With an adjusted goal of 142,000 students served through on-site education programs in the 2025–2026 school year, JYF exceeded its annual target. The FY2027 goal remains unchanged in anticipation of continued staffing challenges and uncertainty surrounding schools' ability to fund field trips. We are currently on track to meet or exceed this goal, with 118,770 students booked or served as of October 1, 2026. Outreach programs have booked or served an additional 21,319 students, a slight increase over the same period last year.

  The primary challenges to expanding student participation remain rising transportation costs for schools and the recruitment and retention of education staff. Since the pandemic, the applicant pool for positions requiring frequent travel, outdoor work in varying weather conditions, and offering no healthcare benefits has become increasingly limited. We continue to collaborate with the Human Relations and Professional Development department to strengthen recruitment strategies and identify new candidate pools to sustain and expand program capacity.

Year	On-site Goal	On-site Actual	Outreach Goal	Outreach Actual
2021-22	32,000	76,116	45,000	16,819
2022-23	126,000	110,096	39,000	36,032
2023-24	129,000	164,143	61,000[1]	47,288
2024-25	149,000	160,700	54,000	37,433
2025-26	142,000	153,714	42,740	34,040
2026-27	142,000		42,740	

- **Growing Homeschool Audiences:** With an eye toward adapting to a changing educational landscape, we are seeking ways to better engage our homeschool audiences through tested and new methods. National and Virginia homeschool student numbers continue to grow steadily. We re-positioned an Education Specialist position this fall to focus on this audience and to better serve our self-guided student groups. During our annual fall homeschool



[1] Outreach goal includes virtual, and in-classroom outreach programs

days, we saw 3,470 visitors, a 16% increase from the year prior (2,998). The Museum Education Specialist is also responsible for increasing our offerings for homeschool audiences throughout the year, offering quarterly homeschool experiences. The Digital Learning Specialist has also successfully grown our virtual homeschool programs, with 106 attendees in 2025. Repeat attendance has fostered a strong sense of community among homeschool participants, who build friendships, recall previous sessions, and share inside jokes.

- **Lilly Endowment Religious Liberty Grant:** Work continues on the $1.7 million Religious Liberty grant from the Lilly Foundation. Development of *Road to Religious Freedom*, an online game created in partnership with iCivics, is nearing completion. In the game, students are tasked by Thomas Jefferson with exploring religious freedom through conversations with historical figures from 18th-century America. Through these encounters, students examine diverse religious experiences, explore the principles of the Virginia Statute for Religious Freedom, and discover how everyday people navigated questions of faith and belief during the Revolutionary era. Planning is also advancing for the *Religious Liberty Trail*, a summer 2027 professional development program that will take 60 secondary school teachers to historic sites in Virginia, Pennsylvania, Massachusetts, and Rhode Island to explore the history of religious liberty. The team is finalizing the itinerary and site visits. To date, 28 applications have been received, with applications closing January 4, 2027.



- **Community Engagement:** The new Community Engagement team has had a successful 2026, welcoming 9,210 visitors in onsite programming from January 1 - October 1. The team has planned or executed 67 public programs for the calendar year.

- **250th Recap:** The Community Engagement team delivered a diverse slate of programs throughout spring and summer 2026, including the annual Liberty Celebration (1,445 visitors) and the inaugural Star-Spangled Cookout (177 attendees). Highlights also included a sold-out *Feast of Reason* dialogue program with culinary historian Michael Twitty, presented in partnership with Thomas Jefferson's Monticello. This fall and winter, the *Revolutionary Moments* series continues with talks exploring themes from the *Give Me Liberty* exhibition. In September, Community Engagement partnered with the Learning team to present



Constitution Week and Virginia Civics Learning Week, connecting visitors with the principles of the nation's founding and their enduring influence on American life.

- **Winter Lantern Festival:** As discussed at the May meeting, the Winter Lantern Festival returns for its second year with a refreshed approach to the lantern displays. Rather than complementing a special exhibition, this year's installations highlight Jamestown's history, the three cultures central to JYF's mission, winter holiday traditions, and the nation's 250th anniversary. As of October 23, advance ticket sales totaled 1,847, generating $42,012.50 in gross revenue.



Jamestown-Yorktown Foundation
LEARNING AND COMMUNITY ENGAGEMENT
Select 2026 – 2027 Public Programs

YOUTH AND FAMILY PROGRAMS

Quarterly Homeschool Program
December 1, 2026 • American Revolution Museum at Yorktown
How do we learn about the past? When does a story become history? In this program, explore how the decisions people made long ago continue to shape the world we live in today. Dig into primary sources to uncover stories from early America and investigate how these legacies influence our present-day experiences.

Family Day: Winter Traditions
December 12, 2026 • American Revolution Museum at Yorktown
Explore winter holidays and traditions through crafts, activities, and musical performances.

Civic Season
June 19-July 4, 2026 • Jamestown Settlement/American Revolution Museum at Yorktown
This nation-wide program, coordinated by the consortium Made By Us, connects with the Gen Z generation to foster civic participation and understanding. Civic Season at JYF will boast daily activities at the American Revolution Museum at Yorktown and a Family Day.

ADULT PROGRAMS

Taquitock Festival
November 7, 2026 • Jamestown Settlement
Join us as we celebrate the eleven Virginia Indian Tribes in a day-long celebration of music, dance, games, art and so much more! In addition to the many outdoor activities, we are partnering with Pocahontas Reframed Film Festival for a showing of past Festival films all day in the museum theater.

Life in the Revolutionary-Era Virginia Backcountry
November 12, 2026 • 6 p.m. • American Revolution Museum at Yorktown
Join William & Mary professor Sarah McCartney, Ph.D., for a look at “Life in the Revolutionary-Era Virginia Backcountry,” at 6 p.m. Thursday, Nov. 12. In conjunction with the "Give Me Liberty: Virginia & The Forging of a Nation" VA250 Signature Exhibition, guests can explore the exhibition in advance beginning at 5 p.m.

4th Annual Yorktown Tea Festival
November 13, 2026 • American Revolution Museum at Yorktown
Come celebrate tea, the beverage that got the colonists in hot water, 9 a.m. - 5 p.m., November 13 at the American Revolution Museum at Yorktown. The event includes a

keynote address from the editor *TeaTime magazine*, hands-on workshops, and tea with Martha Washington.

Bean to Bar Chocolate Workshop
December 5, 2026 • 9-11 a.m. • American Revolution Museum at Yorktown
Join living-history interpreter Robert Brantley for a hands-on workshop about the importance of chocolate in 17th- and 18th-century colonial America. Participants will help roast, shell and grind cocoa beans into chocolate. At the end of the workshop, visitors will be able to take a sample of the handmade chocolate home or eat it on the spot!

Tower Hill: Creating a Plantation During a Revolution
December 10, 2026 • 6 p.m. • American Revolution Museum at Yorktown
Join Alan Shaw Taylor, two-time Pulitzer Prize-winning historian, for "Tower Hill: Creating a Plantation during a Revolution" at 6 p.m. Thursday, December 10. In conjunction with the "Give Me Liberty: Virginia & The Forging of a Nation" VA250 Signature Exhibition, guests can explore the exhibition in advance beginning at 5 p.m.

Give Me Liberty: Securing Victory
January 23, 2027 • American Revolution Museum at Yorktown
The 1783 Treaty of Paris literally set the borders of the new United States and shaped its place within the international order. But even more important for the American military, the years from 1781-1783 were crucial to reaffirming the country's character and ideals. Whether it was debating the morality of partisan fighting in the backcountry, suppressing a potential officers' coup against Congress, or General Washington resigning his commission, these years saw soldiers do more than just win a war— the military built a tradition and established a nation. This talk will be presented by Craig Bruce Smith, professor of history at National Defense University in the Joint Advanced Warfighting School (JAWS) in Norfolk, VA.

Black Artist Showcase: Last Look
March 27, 2027 • Jamestown Settlement
Join us for a celebration of the artists of the Black Artist Showcase! Mix and mingle with the artists and other guests while enjoying music, drinks and hors d'oeuvres during this after-hours last look before the exhibit closes.

The American Revolution on the Pennsylvania Frontier
May 1, 2027 • American Revolution Museum at Yorktown
Historian and Author Chris Yohn will discuss how the men, women and children who settled the West Branch of the Susquehanna Valley made remarkable contributions to American independence and their real-life experiences are more compelling than anything that could have been imagined. In fact, contemporary writings confirm without these heroes, our nation may not have become a reality. But, few have heard of them and what they did. Through courage, self-determination and the relentless pursuit of liberty, these men and women helped forge a nation founded on the radical idea that all people are created equal.

GENERAL AUDIENCE

Winter Lantern Festival
November 5, 2026-January 3, 2027 • Jamestown Settlement
The Winter Lantern Festival returns in 2026! Large scale lit sculptures inspired by Jamestown history, the 250th of the Declaration of Independence, and the winter season will delight and amaze visitors at this unique holiday experience.

Veterans Day
November 11, 2026• American Revolution Museum at Yorktown
Free museum admission is available to the American Revolution Museum at Yorktown and Jamestown Settlement for veteran, active duty, reserve and retired military personnel and up to three direct family members with military identification on Veterans Day, November 11.

The Seven Sips of Kwanzaa: A Community Tasting and Art Experience
November 21, 2026 • 10:30 a.m. and 2 p.m. • Jamestown Settlement
Join us for a sensory journey through the seven principles of Kwanzaa (Nguzo Saba) in two 90-minute sessions, at 10:30 a.m. and 2 p.m. on November 21 at Jamestown Settlement. Each session is included with museum admission and features seven drinks or desserts representing the principles of Kwanzaa.

Foods and Feasts
November 27 & 28, 2026 • Jamestown Settlement/ American Revolution Museum at Yorktown
This Thanksgiving holiday, join in a family tradition by digging into the foodways of 17th- and 18th-century during Foods & Feasts of Colonial Virginia.

Christmastide in Virginia
December 19-31, 2026 • Jamestown Settlement/ American Revolution Museum at Yorktown
Grab your family and friends and join in the revelry during Christmastide in Virginia. Glimpse 17th- and 18th-century holiday traditions through festive interpretive programs, fancy cooking, caroling and musical entertainment.

After Angelo
February 20, 2027 • Jamestown Settlement
After Angelo, a one-day program honoring the legacy of one of the first African women mentioned by name in the historical record at Jamestown, is a lively celebration of African American culture and heritage.

Military Through the Ages
March 20 & 21, 2027 • Jamestown Settlement
Entrench yourself in the past and present day in military encampments and get hands-on with more than 500 re-enactors from nearly 40 distinct military units to experience how military uniforms, weapons and tactics evolved through the centuries.

Juneteenth Celebration
June 13, 2027 • Jamestown Settlement
Come celebrate Juneteenth at Jamestown Settlement! Join us for performances and tours that celebrate both the historic connections to Juneteenth as well as the legacies of Juneteenth that echo through to today.

Liberty Celebration
July 4, 2027 • American Revolution Museum at Yorktown
Artillery salutes, fifes and drums, and military reenactors come together to help celebrate the 249th anniversary of the signing of the Declaration of Independence.

First Africans
August 2027 • Jamestown Settlement
Jamestown Settlement honors the legacy of the first recorded Africans brought to Virginia in 1619 with reflections of history and modern perspectives through an African American lens.

TARGET OPPORTUNITIES FOR 2027

- Cultivating partnerships with other history and community organizations to co-host events and programs—growing audiences and establishing relationships that will serve programming opportunities in 2031.
- Exploring new audiences, working to establish an early learner program, and increasing workshop and hands on opportunities for adult learners.

Jamestown-Yorktown Foundation
CURATORIAL REVIEW
Semi-Annual Acquisitions Report

For the period January 1, 2026, through June 30, 2026, the Jamestown-Yorktown Foundation, Inc. obtained, either through donation or purchase, a total of five artifacts which will allow new stories to be told at both the American Revolution Museum at Yorktown and at Jamestown Settlement. Detailed artifact descriptions may be found on the following pages.

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1. Portrait of George Washington,
2. Replica Hiawatha Wampum Belt
3. Red Chalk Drawing of Algonquin Figures
4. Two Howitzers Surrendered at Yorktown

ARTIFACT DESCRIPTIONS

Portrait of George Washington, Charles Peale Polk, ca. 1790

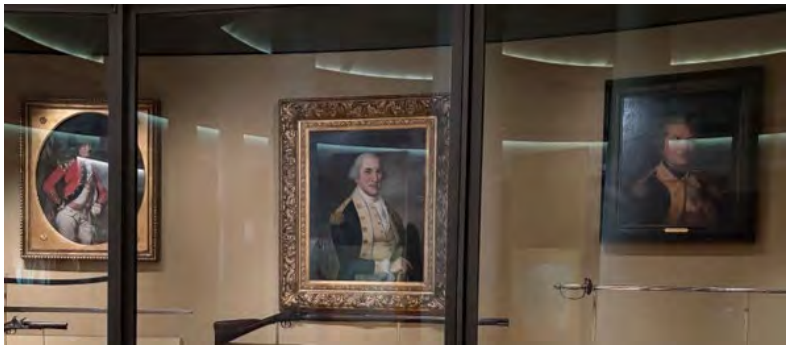
For Use In: American Revolution Museum at Yorktown
Purchased From: Robert Simon Fine Art, Inc.



This portrait by Charles Peale Polk depicts George Washington, half-length, dressed in the general officer's uniform of the Continental Army with three stars on his epaulettes, befitting the Commander and Chief.

Polk trained under his uncle and famed artist, Charles Willson Peale, who created the iconic "Convention Portrait" in 1787 when Washington sat for him while serving as president of the Constitutional Convention in Philadelphia. Polk used his uncle Charles' portrait as the source for his own compositions of George Washington, creating more than 50 variations, all dating between 1787 and 1793. These came to be known as the "Princeton" portraits because several depict Princeton's Nassau Hall in the background, referencing the January 1777 Battle of Princeton victory, a turning point in the war. Other versions depict soldiers and an encampment in the background. All show Washington in uniform with three-star epaulets.

For nearly a decade, JYF had searched for a painting of George Washington to display in the main gallery of the American Revolution Museum at Yorktown. Thanks to an extensive network of contacts in the art world, JYF's former Senior Curator, Sarah Meschutt, learned of the portrait's existence in early 2025. Following swift action by the Inc. Board's Acquisitions Committee and JYF staff, a phased purchase agreement was developed. In July 2025, the portrait was received as a loan and installed in the main gallery. It is now on display between a 1783 portrait of General Cornwallis by Daniel Gardner, and a late 18th-century, Charles Willson Peale portrait of Louis Antoine Jean-Baptiste, Chevalier de Chambray-Digny, a French officer present at the Battle of Yorktown.



In January 2026, the phased purchase of the portrait that began in May 2025 was completed.

Replica Hiawatha Wampum Belt, Ken Maracle, 2025

For Use In: American Revolution Museum at Yorktown
Purchased From: The Wampum Shop



Purchased with funds from the Lilly Endowment, the belt is a replica of the national belt of the Haudenosaunee (Iroquois) Confederacy. That belt, known as the "Hiawatha Belt," was created centuries ago to record when five warring nations; the Seneca, Cayuga, Onondaga, Oneida, and Mohawk, were guided by the Peacemaker to bury their weapons of war and live in peace.



Wampum are small, polished beads varying in shades of purple and white, crafted from quahog clam shell and often strung together into strands or belts. Used for personal decoration, trade, and to record important events and agreements, wampum's value derives from the skill, time and effort required to make the beads. In the 17th and 18th centuries, wampum played an important role in diplomacy between American Indian nations and European colonists.



Ken Maracle, a Cayuga tribal member from the Six Nations of Ontario, constructed JYF's replica belt, shaping quahog shells into tradition wampum beads. His handcrafted belts preserve the stories, teachings, and agreements carried on through multiple generations and are featured in several museums.



JYF's replica Hiawatha belt will be displayed in the main galleries at the American Revolution Museum at Yorktown where it will support interpretation about Haudenosaunee participation in the American Revolution, the split that happened in the Confederacy during the war, and the participation of the Onedia allies in the Siege of Yorktown in 1781.

Drawing: An Algonquin Werowance (Chief), Viewed from the Front and Back, and the Wife of a Werowance from Secotan, red chalk on laid paper, German School, post 1590

For Use In: Jamestown Settlement Museum
Purchased From: Robert Simon Fine Art, Inc.



This red chalk drawing, considered to have been made in a German workshop in the late 16th or early 17th century, copies two figures from Theodor de Bry's 1590 engravings after John White's 1585 watercolors of the coastal Carolina Indians.

The drawing is derived from Plates II and IIII of the 1590 illustrated German edition of Thomas Harriot's narrative engraved by Theodor de Bry. A German inscription in red chalk at the top of the drawing sheet corresponds to the printed captions in Harriot's text and translates to: "A depiction of the princes and lords in Virginia" and "A noble woman from Secota." Secotan was a chief's town that included three or four settlements on the Pamlico River and was the subject of a number of John White's paintings. Depicted on White's ca. 1585 Map of La Virginea Pars, it is believed to have been located near present-day Winsteadville in Beaufort County, North Carolina.

The drawing embodies how people in the past engaged with, interpreted, and transmitted historical events. The sheet documents the reception and reuse of Virginia imagery in German-speaking Europe, where de Bry's publications played a crucial role in disseminating knowledge about colonial ventures. In this drawing, the Algonquian peoples of coastal Carolina, English observation, and German studio practice meet on a single sheet, illustrating how English encounters with the Native peoples of North America were transformed into European visual knowledge.

This acquisition supports the Master Acquisitions Plan through themes of Interactions with History, Local to Global Connections, and Convergence of Cultures. The drawing will be incorporated into new exhibits at Jamestown Settlement.

Howitzers: William Bowen (metal founder), cast 1755, in London and Richard Gilpin, (metal founder), cast 1760, in London

For Use In: American Revolution Museum at Yorktown
Gifted From: U.S. Army Tank & Armaments Command (TACOM)



For many decades, the College of William & Mary displayed two English bronze howitzers—allied trophies from the Yorktown battle of the American Revolution—outside of the Wren Building. The howitzers were among more than 240 artillery pieces surrendered on October 19, 1781, by the British general, Lord Cornwallis to the allied victors, General George Washington and the Count of Rochambeau. The two howitzer artillery pieces are marked with the source and date of capture by the Continental Army. All artillery pieces surrendered by the British forces were identified this way with the date and place of capture, a directive issued by General George Washington.

When JYF was notified by the college that they no longer wished to display the howitzers, the Curatorial team applied to the federal government to acquire custody of them. TACOM awarded JYF Inc with a conditional gift of the howitzers and they were received to prepare for their installation in the main gallery at the American Revolution Museum at Yorktown, outside the Siege Theater.



These artillery pieces are two of the fifteen howitzers used by the British at the Siege of Yorktown, and, as such, are extremely rare. Moreover, Revolutionary War ordnance of this type and date, has not appeared on the open market at auction in this millennium.

Previously, JYF had no weapons in inventory documented as part of the equipment of the British army or the Continental army that performed at the Siege of Yorktown. These two howitzers with a direct connection to October 19, 1781, will greatly enhance interpretation of that decisive battle of the American Revolution.

Jamestown-Yorktown Foundation
CURATORIAL REVIEW
Semi-Annual Conservation Report

Artifact Conservation January - June 2026

During the period of January to June 2026, two artifacts received conservation services from professional specialist conservators. Conservation procedures were documented and carried out in compliance with the principles set forth in the Code of Ethics and Guidelines for practice of American Institute for Conservation.

Goldsmith Chandlee Compass



The compass was conserved in preparation for the American Revolution Museum venue of the exhibition *Give Me Liberty: Virginia & The Forging of a Nation.* The objects conservator began by disassembling the compass.



Lacquer, surface grime and corrosion products were removed. All surfaces were cleaned, the brass was re-coated, the compass needle was set back in place and the object was reassembled. The conservation was completed in time for the compass to be installed for the exhibition opening.

Drawing: An Algonquin Werowance (Chief), Viewed from the Front and Back, and the Wife of a Werowance from Secotan



Prior to its acquisition, a paper conservator unframed and examined the red chalk drawing, finding it to be in very good condition overall. However, the drawing is attached directly to its window mat with pressure sensitive hinges that can yellow and age over time.



The recommendations for conservation treatment include the removal of the existing hinges followed by attaching Japanese paper hinges adhered with wheat starch paste along the top edge verso of the artwork, followed by attaching the artwork to the backing board of the window mat using the new hinges. This treatment will be accomplished in Richmond in early 2027.

Jamestown-Yorktown Foundation
COLLECTIONS MANAGEMENT
Policy Revisions

7. DEACCESSION AND DISPOSAL POLICY – NAGPRA Addendum Draft

7.1 Purpose of Deaccession Policy

A. Artifacts in the Foundation's collection are retained permanently if they continue to be relevant and useful to the purposes and activities of the Foundation and if they can be properly stored, preserved, and used. Deaccessioning of artifacts may be considered when these conditions no longer prevail or when deaccessioning is determined to be consistent with the purposes and activities of the Foundation and Foundation, Inc., to refine the collections. Reasons for deaccessioning may include:

1. Object is not relevant to the collection.

2. Object is redundant or is a duplicate.

3. The authenticity, attribution or genuineness of an artifact is determined to be inaccurate or fraudulent.

4. The museum is unable to conserve the artifact in a responsible manner, or it is determined that it has decomposed irreversibly.

5. Compliance with federal and/or state laws including the Native American Graves Protection and Repatriation Act (NAGPRA) (43CFR10).

7.2 Deaccessioning for the purpose of NAGPRA repatriation

A. May occur following the completion of all requirements outlined in:

1. 43CFR10.9 Requirements: Approval of a repatriation request, publication of a Notice of Intended Repatriation, and submission of a repatriation statement.

2. 43CFR10.10 Requirements: Publication of a Notice of Inventory Completion, approval of a repatriation request, and submission of a repatriation statement.

B. Deaccessioning and physical transfer for NAGPRA repatriation must follow the consultation requirements outlined in 43CFR10.9(g) and 43CFR10.10(h).

C. Jamestown-Yorktown Foundation NAGPRA Repatriation, Deaccession and Disposition Form will be used to document processes and approvals.

D. Signatories of the Form will certify that all NAGPRA requirements have been met for repatriation and following their approval will submit the Form to the Chairman of the Jamestown-Yorktown Foundation's Public Programming Committee for formal endorsement of deaccessioning and disposition of the cultural items.

E. The Public Programming Committee of the Jamestown-Yorktown Foundation has oversight authority for ownership, management and exhibition of the collections with such functions carried out by Foundation's staff. Deaccessions fall under the jurisdiction of the Foundation's Public Programming Committee.

F. Jamestown-Yorktown Foundation must consult with repatriation requestors (claimants) on physical transfer, document any physical transfer, and protect sensitive information, as identified by the requestor, from disclosure to the general public to the extent consistent with applicable law.

G. A repatriation agreement reached through consultation with claimants may result in the physical transfer of an artifact to the claimant or it may result in a stewardship agreement between the claimant and the Jamestown-Yorktown Foundation, in which the transfer occurs in situ, with Foundation retaining physical custody of an artifact held in trust for the claimant until such time as there is a physical transfer of custody.

H. The repatriation agreement will define the negotiated method, terms and conditions of the disposition and indicate the party or parties responsible for repatriation and disposition expenses such as those for ceremonies, transportation and courier travel.

I. The stewardship agreement will define the negotiated terms and conditions by which the Jamestown-Yorktown Foundation will retain physical custody and exercise stewardship of the cultural items. The stewardship agreement will be reviewed with the claimants on a schedule to be determined in the agreement if and when the claimant takes physical custody. The agreement will define the responsibilities of each party.

7.3 Deaccessioning for Purposes other than NAGPRA repatriation

A. Artifacts in the collections are deaccessioned upon the written recommendations of the Senior Curator made to the Staff Collections Committee. If recommended by the Staff Collections Committee. it is forwarded to the Executive Director for approval. If recommended for

deaccessioning by the Executive Director, it is forwarded to the Exhibitions & Collections Committee of the Board of Trustees for approval or denial.

B. Senior Curator's recommendations for deaccession and disposition of an artifact or group of like artifacts will specify the source and/or provenance of the artifact, the reasons for deaccessioning, the estimated market value, and the recommended means of disposition which may include transfer to another museum**,** library, or other appropriate site, public auction, or destruction.

C. The artifact deaccessioning and disposition process may be documented using the Recommendation for Artifact Deaccessioning form.

D. Artifacts in the collections without records or accession numbers will be handled in the same manner as accessioned artifacts. The Senior Curator shall attempt to determine ownership of these artifacts prior to taking action on their disposal. If ownership is not determined, artifacts will not be deaccessioned without seeking the advice of legal counsel.

7.4 Methods of Disposition of Deaccessioned Artifacts

A. For purposes other than NAGPRA repatriation determining the disposition of deaccessioned artifacts, the Foundation is concerned that:

1. The manner of the disposition is in the best interest of the Foundation, the public they serve, the public trust represented in owning the collections, and the scholarly or cultural communities that the Foundation and Foundation, Inc., represent.

2. Best attempt should be made whenever possible to placing the artifacts, through donation or sale, in another tax-exempt public institution where they may serve the purpose for which they were initially acquired by the Foundation.

3. Artifacts may be designated for transfer to other appropriate administrative units within the Foundation such as the education offices, research library, or archives.

4. If artifacts are offered for sale, preference is given for sale at advertised public auction or in the public marketplace in a manner that will best protect the interests, objectives, and legal status of the Foundation and the Foundation, Inc**.** Funds recognized from any such sales shall revert to the Foundation, Inc. and be used solely for artifact acquisition purposes or direct care of the collections.

5. Artifacts shall not be given or sold to employees, officers or members of the governing authorities, their immediate families, or to their representatives.

6. All final decisions will be made in keeping with the AAM Code of Ethics for Museums.

7.5 Confirming Unrestricted Use to Dispose of Artifacts

A. Before deaccessioning any artifacts from the collections, reasonable efforts will be made to ascertain that the Foundation is free to do so. Where **restrictions** as to use or disposition of the artifacts under question are found to apply, the Foundation shall:

1. Strictly observe mandatory restrictions unless deviation from their terms is authorized by a court of competent jurisdiction.

2. Notify the donor of accessioned artifacts when it is practical and reasonable to do so, if the artifact donation was made within ten years.

3. Seek the advice of legal counsel if there is any question as to the intent or force of restrictions.

4. Contact a customs broker for current regulations governing disposition of artifacts considered for deaccession that have been acquired within the last five (5) years from a foreign country and may still be governed by United States Customs regulations.

7.6 Deaccession Records

A. A written record of the conditions and circumstances under which artifacts are deaccessioned and disposed of shall be made and retained as part of the Foundation collections records.

B. A list of all artifacts, which have been deaccessioned from the collections within the past five years, shall be kept current by the Registrar.

7.7 Proceeds from Artifact Deaccession

A. Proceeds derived from the sale of deaccessioned artifacts shall be used solely for the acquisition of collections or for the direct care of collections, in accordance with current American Alliance of Museums (AAM) standards. Direct care funds shall be restricted to actions that enhance the life, usefulness, or quality of physical collections assets and shall not be used for general operating expenses solely for artifact acquisition purposes or direct care of the collections.

Jamestown-Yorktown Foundation **Tuesday, November 10, 2026**
Board of Trustees **American Revolution Museum at Yorktown**
Administration & Personnel Committee **Classroom A-B-C or Via Teams**
1:30 PM

Delegate Hyland F. Fowler, Jr., *Chair*
Delegate Shelly A. Simonds, Vice Chair
Chief Stephen R. Adkins, Sr.
Mrs. Laura W. Bailey
Delegate Gretchen M. Bulova
Senator J.D. (Danny) Diggs
Ms. Julianna (Julie) M. Dime
Mrs. Sue H. Gerdelman
Professor Ervin L. Jordan, Jr.
Senator Mamie E. Locke
Senator Ryan T. McDougle
Senator Thomas K. Norment, Jr.
Professor James J. Wheaton

AGENDA

I. **Call to Order – Delegate Fowler**

II. **Approval of Minutes: November 12, 2025, and May 7, 2026 – Delegate Fowler** *(Action Required)*
p. 80-90

III. **Human Resource Metrics – Mrs. Shelhorse, Mr. Mozingo**
p. 91

IV. **Employee Engagement Survey Results – Mr. Mozingo**
p. 96

V. **Other Business – Delegate Fowler**

VI. **Adjournment – Delegate Fowler** *(Action Required)*

Committee Members Present:	Buddy Fowler, Charles James, Gloria Chambers, Danny Diggs, Sue Gerdelman, Mamie Locke
Committee Members Absent:	Stephen Adkins, Laura Bailey, Julie Dime, Cliff Hayes, Ryan McDougle
Board Members Present:	Marshall Acuff, Ann Baise, Jamie Burke (Virtual), Betsy Carr, Ben Dendy, Terry Hall (Virtual), Anne Marie Morgan, Delores McQuinn, Fred Palmore, Ken Plum
Staff Present:	Christy Coleman, LaTroya Flemming, Connie Graham (Virtual), Heather Hower, Michael Klimenko (Virtual), Homer Lanier, Mariruth Leftwich, Lisa Lucas, Juliet Machie, Coy Mozingo, Will Nixon, Tracy Perkins, Kendall Schoonover, Lee Ann Shelhorse, Glenda Turner, Sue Trettin (Virtual)
Other Guests:	Abigail Gump (OAG Rep)

I. Call to Order

The meeting of the Administration and Personnel Committee was called to order by Del. Fowler, on Wednesday, November 12, 2025, at 1:30 p.m. at the American Revolution Museum at Yorktown. Mrs. Chambers moved and Sen. Locke seconded.

II. Approval of Minutes

Del. Fowler referred members to the minutes of the May 2nd, 2025, meeting. Mrs. Chambers moved and Sen. Locke seconded approval of the committee meeting minutes. The motion was approved by unanimous vote.

III. Human Resources Metrics and Five-Year Trends

Del. Fowler introduced Talent Acquisition Manager Mrs. Lee Ann Shelhorse and she shared an update on employment trends, recruitment challenges, turnover, and workforce diversity, comparing data from the last 5 years.

The workforce review highlighted several trends observed over the past five years. Turnover among classified staff fluctuated, reaching approximately 19 percent at its highest point before stabilizing near 16 percent. Wage staff turnover has been more volatile, spiking above 70 percent during the pandemic due to resignations and record clean-up, and currently remains around 30 percent. Seasonal turnover in visitor-facing wage roles continues to be a significant challenge. Despite these issues, overall headcount has increased, with growth in both classified and wage positions compared to prior years.

Retirements have steadily risen, accounting for 25 percent of separations compared to 15 percent five years ago. Nearly one-quarter of classified staff are currently eligible to retire, with projections indicating that number will reach 27 percent by 2030. In response, a succession planning process will be implemented next year to engage staff nearing retirement, particularly those in key roles, and to ensure smooth transitions and knowledge retention.

Recruitment has become increasingly difficult. Applicant numbers have declined from nearly 1,500 in 2024 to about 677 in 2025. Applications per posting are down, and the average time to fill a position has lengthened to 62 days, creating gaps in frontline and technical roles. Minority applicant share has also decreased from 35 percent to 28 percent. To address these challenges, efforts are underway to broaden recruitment outreach, review postings for accessibility, and evaluate compensation for hard-to-fill positions.

Volunteer participation presents a mixed picture. Reported hours fell from 52,000 to 36,000 due to inactive record clean-up, but active volunteer numbers increased by approximately nine percent year over year. Regular volunteer participation typically ranges from 75 to 100 individuals, rising to around 150 during the summer months. Consistent reporting will begin next year, providing a clearer view of volunteer engagement.

Diversity has shown long-term improvement, with staff diversity increasing from 12 percent in 2019 to nearly 19 percent in 2023. A slight dip occurred in 2025, and representation among Black and African American staff declined after peaking in 2024. While overall progress has been positive, continued focus is needed to sustain gains.

Workforce health and safety indicators raised concerns. Workers' Compensation and disability claims, which had been trending downward, spiked in FY25 to the highest level in five years. This increase has resulted in more lost workdays, higher costs, and added strain on staff. Further analysis will be conducted

to identify root causes, such as workload or safety issues, and to strengthen employee support.

In summary, the workforce has grown, succession planning is being introduced, and diversity has advanced. At the same time, challenges remain in wage staff turnover, recruitment, retirements, and workforce health. These areas will require focused attention moving forward. No questions were heard.

IV. Employee Engagement Survey Results

Del. Fowler introduced HR Director Mr. Coy Mozingo and the results of the 2025 Employee Engagement Survey were presented as part of the organization's ongoing commitment to listening to staff and using data to guide improvement. This is the second year the survey has been conducted, and the findings highlight key trends, areas of progress, and opportunities aligned with strategic priorities.

The survey included 53 closed-ended questions on a six-point scale, along with two open-ended questions that provided qualitative feedback. Fifteen demographic filters—such as department, tenure, and work status—were applied to better understand patterns across the workforce. Statistical significance was noted to distinguish meaningful changes from chance variation. Participation rose from 54 percent to 67 percent, a 13-point gain that demonstrates strong employee engagement with the process and provides confidence in the representativeness of the data.

Overall scores improved from 4.48 to 4.62, with percent favorable responses increasing to 85 percent and the percentile ranking rising from 21st to 33rd. Ninety percent of repeat items improved, far exceeding the 50 percent benchmark typically seen in peer organizations. The Net Promoter Score (eNPS), which measures how likely employees are to recommend the organization as a place to work, shifted from -1 to +10, reflecting growing confidence and a significant change in sentiment. While the long-term goal is +30 or higher, the 11-point gain in one-year signals that current efforts are resonating.

The Engagement Index, the most critical measure of emotional and organizational commitment, rose from 4.68 to 4.83. Percent favorable increased to 88 percent, and the percentile ranking climbed from 28th to 44th. Every survey category improved compared to 2024, including engagement, supervisor relationships, diversity and inclusion, and career growth. Top-performing categories included Work From Home, Engagement, and Career Growth, all scoring above 4.7. Even traditionally challenging areas such as Burnout/Resilience and Leadership

Team showed meaningful gains. Trust and Work Environment remain lower relative to other categories, but both improved year-over-year.

Compared to national benchmarks, the organization is strongest in diversity, equity, and inclusion (DEI) and remote work effectiveness. Ninety-three percent of employees reported knowing how to report harassment or discrimination, and 91 percent expressed a sense of belonging—both above national norms. Year-over-year gains were also evident in leadership responsiveness, with improvements in clear departmental goals (+0.39), leadership communication (+0.32), and perceived fairness of pay (+0.30). While compensation still lags behind the norm, the improvement suggests employees are recognizing organizational efforts.

Opportunities remain in several areas. Employees' ability to maintain focus while working from home is 1.21 points below the national norm. Trust between departments is a significant concern, with a 0th percentile ranking that reflects ongoing silos and communication breakdowns. Transparency in career advancement and staffing adequacy also remain below expectations. Only four items declined from 2024, including a slight dip in confidence around reporting harassment or discrimination, though this measure remains above the norm at 93 percent favorable. Staffing adequacy continues to be the lowest-rated item at 50 percent favorable, consistent with open-ended feedback and burnout indicators. Transparency in promotions, fair compensation, and interdepartmental trust also remain challenges.

Burnout decreased from 33 percent to 30 percent, below the national average of 35 percent. The most common causes cited were workload, staffing shortages, and lack of support or clear expectations. Diversity, opportunity, and inclusion measures all improved, with 91 percent of employees reporting a sense of belonging and 96 percent feeling comfortable asking colleagues for help. Transparency in career advancement remains an area of concern and will be addressed through clearer pathways and communication.

Work environment scores revealed that twelve workgroups rated below 4.33 on items related to staffing, tools, trust, and collaboration. Fifteen workgroups scored below 4.28 on items related to employee value, including growth, recognition, and fair compensation. These findings reinforce the need to continue investing in professional development, transparent advancement pathways, and total rewards, while also improving communication across all levels.

Action planning has already begun. Results are being cascaded to departments and teams, the executive team has reviewed the data, and managers are equipped with tools to lead local planning. Gallagher's "Knowledge Now"

platform is being used to track progress and ensure accountability, reinforcing that this is part of a continuous improvement cycle rather than a one-time event.

Open-ended feedback revealed that employees most often cited staffing, compensation, and communication as areas they would change. Education staff also called for more interactive visitor experiences. When asked why they stay, employees pointed to pride in the mission, a sense of purpose, and camaraderie—underscoring their deep commitment to public service and education.

In summary, the survey results show significant progress in engagement, communication, and leadership trust, while highlighting ongoing challenges in staffing, compensation, and interdepartmental trust. Moving forward, two strategic priorities will guide action: improving the work environment through collaboration and staffing, and enhancing employee value through recognition, development, and communication.

Mrs. Gerdelman asked, “Do you think you are receiving results, because staff know it’s private?” Mozingo answered yes and wage staff have access to emails now.

V. Other Business

Del. Fowler called for any other business, and none was heard.

VI. Adjournment

There being no further business, Del. Fowler called for a motion to adjourn the meeting. Sen. Locke made a motion, which was seconded by Mrs. Chambers and approved by all. Del. Fowler officially adjourned the meeting.

Committee Members Present:	Stephen Adkins, Laura Bailey, Charles James, Danny Diggs, Sue Gerdelman, Mamie Locke (v)
Committee Members Absent:	Buddy Fowler, Gloria Chambers, Julie Dime, Cliff Hayes, Ryan McDougle
Board Members Present:	Ann Baise, Terry Hall, Bill White, Michael Harrison
Staff Present:	Christy Coleman, Coy Mozingo, LaTroya Flemming, Lee Ann Shelhorse, Kendall Schoonover, William Nixon, Glenda Turner, Juliet Machie, Melissa Thompson, Michael Klimenko (Virtual),
Other Guests:	Ambria Wood (OAG Rep)

I. Call to Order

The meeting of the Administration and Personnel Committee was called to order by Mr. James, on Thursday, May 7th, 2026, at 8:30 a.m. at the Jamestown Settlement. Mrs. Gerdelman moved and Chief Adkins seconded. Mr. James asked that those making motions identify themselves to aid in keeping the minutes.

II. Approval of Minutes

Mr. James referred members to the minutes of the November 12th, 2025, meeting. Minutes were not approved as quorum was not met.

III. Human Resources Metrics

Lee Ann Shelhorse, Talent Acquisition Manager, presented the HR Metrics Report covering workforce data for Calendar Years 2024 through 2026 year-to-date, with figures current as of April 15, 2026. The presentation addressed seven areas: a workforce snapshot, recruitment and hiring trends, turnover analysis, workforce demographics, programs and engagement highlights, and metrics to be tracked at the next board update.

HR at a Glance. JYF's authorized classified staffing level is 176 positions, with an average of 160 classified employees and 124 wage employees. Average time-to-fill has improved from 60 days in 2024 to 46 days, a reduction of 14 days. The agency received 1,274 applications in 2025, averaging 24 applications per open

position, with 387 applicants received year-to-date in 2026. Combined annual turnover stands at 15.33% for 2026 YTD, down from 24.6% in 2025. Recruitment and Hiring Trends. JYF posted 58 positions in 2024, 61 in 2025, and 19 year-to-date in 2026, with total hires of 91, 79, and 15 for those respective periods. Total applicant volume was 1,452 in 2024 and 1,274 in 2025; average applications per position held essentially steady at 25 and 24, with the 2026 YTD average at 18.4. Time-to-fill is currently tracking at 45 days in 2026 YTD.

Turnover Analysis. Combined turnover rose from 21.5% in FY2024 to 24.6% in FY2025, driven primarily by wage staff turnover, which climbed from 24.0% to 33.2%. Classified staff turnover improved from 19.3% in FY2024 to 16.6% in FY2025. For 2026 YTD, combined turnover has fallen to 15.33% and classified staff turnover is at 9%, below the Virginia state classified employee average of 13.7%. The nonprofit and cultural sector average typically ranges between 15% and 18%. The highest-turnover positions by year were Onsite Education and Visitor Services Associate (2024); Museum Educator I and Living History Interpreter (2025); and Learning Facilitator (2026 YTD). The most difficult-to-fill positions were Payroll and Budget Tech and Accounting Operations Manager (2024); Budget Analyst and Custodians (2025); and Budget Analyst, Custodian (wage), and Trades Technician (2026 YTD).

Workforce Demographics. The overall workforce is 56% female, 43% male, and 1% other or not disclosed; at the leadership level, women represent 67% and men 33%. Organization-wide racial and ethnic composition is 82% White, 11% Black or African American, 2% Asian, 1% Hispanic or Latino, 1% Native American, and 3% other or not disclosed, with total workforce diversity at 18%. Leadership composition is 84% White, 11% Black or African American, 2% Asian, 2% Hispanic or Latino, 0% Native American, and 2% other or not disclosed, for total leadership diversity of 19%. Female applicants represented 59% of the applicant pool in 2024, 49.1% in 2025, and 38% in 2026 YTD; male applicants were 41%, 42.4%, and 55.3%, respectively. Minority applicants in the applicant pool have trended upward: 32% in 2024, 34.7% in 2025, and 35.6% in 2026 YTD.

Programs and Engagement. In FY2026, volunteers logged 31,245 hours; there are 228 active volunteers, including 155 core volunteers. Twenty-six current staff members began as volunteers, 23 staff members volunteer in other JYF areas or events, and 13 core volunteers are former staff. Classroom training attendance reached 1,583 and online attendance was 829. From November 2025 through April 2026, 76 external professional development opportunities were offered and 368 evaluation responses were collected; the overall training rating was 4.62 out of 5, instructor satisfaction was 4.33 out of 5, and the Professional Development Net Promoter Scale average score was 50. HR represented JYF at engagement

events with William & Mary, Christopher Newport University, Norfolk State, Old Dominion University, and Virginia Tech, and participated in the Greater Hampton Roads Workforce Council, the 2025 Legislative Roundtable, the 757 Regional Internship Collaborative, and COVA Intern Capitol Tour Day. Active recognition and wellness programs include the Internal Appreciation Program, JYF and Red Cross Blood Drives, Wellness Wednesdays, Scoop Articles, 12 Days of Holiday Giveaways, the Volunteer Collab Social and Holiday Brunch, and the Annual Service Awards Dinner.

Metrics to Watch. Mrs. Shelhorse identified six metrics for tracking at the next board update: time-to-fill (target at or below 46 days); full-year turnover rate; performance management completion rates for goal-setting, self-evaluations, and annual evaluations; engagement survey results from the new Gallagher survey launching May 19; professional development participation against targets of 45% for managers and 35% for non-managers; and volunteer metrics with targets of 65% retention, 80% satisfaction, and positive net growth.
No action was required. Discussion followed. Mrs. Gerdelman inquired about the time to fill. Ms. Coleman asked to define ‘leadership’.

IV. HR Strategic Plan Updates

Coy Mozingo, HR Senior Director, and LaTroya Flemming, Benefits and Compliance Manager, presented an update on the HR and Professional Development Department's strategic plan covering November 2025 through April 2026.

Strategic Framework. Mr. Mozingo described the four-year HR strategic plan, built on three pillars: People (cultivating trust, rewarding performance, and building a workforce for tomorrow); Programs (investing in employee growth, volunteerism, and programs that make JYF a destination employer); and Communication (ensuring team members and candidates can connect with the information they need).

Pillar One — People. Mr. Mozingo reported that JYF's new performance management system is fully implemented, with supervisor training built and sessions underway. Ms. Flemming reported that a full market benchmarking and pay equity review across all classified positions was completed, with findings identifying pay gaps and compression issues presented to agency leadership in March 2026; that a formal Identifying Critical Roles Policy defining critical roles, succession criteria, and readiness documentation was developed and approved; that a new recruitment policy was approved with standard operating procedures created; and that the DHRM-driven Pay Action Worksheet (PAW) system was successfully rolled out to supervisors, with a full Personnel Actions SOP currently in development. By the numbers: 100% of classified positions have been compensation-benchmarked; more than 75% of supervisors are now attending performance management training; ten

new HR policies were approved and posted during the period, covering critical role identification, teleworking, leave share, reasonable accommodation, return to work, workers compensation, and workforce maximization, among others; and 90% of the PAW process has been implemented.

Pillar Two — Programs. Mr. Mozingo reported that the Professional Development Tracker is complete, with a new tracking system rolled out during the last performance cycle and an accompanying policy published in February 2026; that the Wage Workforce Maximization cross-training program for wage employees was formalized through an approved policy; and that the Volunteer Recognition Program is in progress, with a new recognition committee formed, a final draft recognition handbook under review, and branding discussions underway.

Pillar Three — Communication. Ms. Flemming reported that the Employee Relations SOPs and tracking system are complete, with comprehensive ER SOPs developed, supervisor training delivered in October 2025, and a new ER tracking system in place; baseline data collection is underway. Mr. Mozingo reported that the HR Intranet Portal is in progress with policies fully updated and forms being finalized, and that the Recruitment Webpage Redesign is in progress, with the initial content review complete, revised language in development, design and layout discussions underway with the Communications team, and a new web-based application for youth volunteers also in progress.

Looking Ahead. For Spring through Fall 2026, HR plans to launch the formal Employee and Volunteer Recognition Program, finalize recruitment SOPs and distribute a hiring manager toolkit, begin the new Gallagher engagement survey on May 19, track compensation satisfaction baseline via the FY26 survey, and continue supervisor PM training. Under Programs, HR will explore intra-agency cross-training or exposure assignments for classified staff, begin a team retreat needs assessment survey, track professional development participation, and formalize volunteer recognition branding with Marketing. Under Communication, HR will launch the updated JYF recruitment webpage, kick off a social media recruitment strategy with Marketing, complete HR intranet portal publishing, establish social media engagement and application source baselines, and create a communication skills workshop.

No action was required. Discussion followed.

Mr. Hall asked about wage staff having access to a computer.

Mrs. Gerdelman asked about financial side and impacts.

V. Additional Budget Impacts

Sr. Finance Director Will Nixon presented information regarding FY2026 and FY2027 state budget impacts on the Jamestown-Yorktown Foundation.

FY2026 Compensation Adjustments. Mr. Nixon reported that Chapter 7, Item 469, Paragraph X.1 authorizes a one-time bonus payment of $1,500 for classified

personnel on June 16, 2026. Wage employees are not included in the legislation and are not eligible to receive the bonus. The estimated total impact of the bonus is $264,819. In April, the agency received $147,196 in central appropriations to support the cost of the bonus, and the remaining $117,623 non-general fund portion will be funded from current-year vacancy savings, which has been factored into year-end cash projections.

Mrs. Gerdelman asked about the language intended to use to communicate about the wage bonuses. Ms. Baise raised concern for wage staff. Senator Diggs inquired about the use of state funding and the budget language. Mrs. Gerdelman asked about the operational costs. Mrs. Shelhorse suggested giving wage staff paid leave may be the change. Mrs. Gerdelman and Senator Diggs disagreed. Mr. James questioned the impact of not giving the bonus. And suggested approaching the state finance holders and clarifying the language and appealing to them to be able to carry through a bonus for wage staff. It was also mentioned to unite with other museum entities to do this. Mr. Nixon asked if he could bring this to the Executive and Finance Committee for further discussion and approval to seek other avenues for a wage bonus.

FY2027 Compensation Adjustments. Mr. Nixon advised that the Virginia state budget for FY2027 has not been approved, but the current proposed budget — based on the HB30 and SB30 committee reports — includes a 3% base salary increase effective July 10, 2026, for classified employees rated "Contributor" or above, and significant increases to the employer share of healthcare premiums.

Financial Impact — Classified Salary Increases. JYF has an authorized Maximum Employment Level of 176 full-time classified employees and is currently budgeted for 175 classified positions, with some held vacant temporarily to reduce costs. The General Fund supports 105 positions (60% of the classified workforce), and Non-general Funds support the remaining 70 positions (40%). The total cost of the required 3% classified base salary increase is $360,801. JYF anticipates receiving an additional $119,168 in state central appropriations to the agency general fund for general-funded positions, and will utilize $268,974 in non-general funds for the remaining NGF positions.

Financial Impact — Wage Compensation. Extending the 3% base salary increase to the agency's part-time wage personnel will require an estimated $65,230 in non-general funds.

Financial Impact — Employer Health Care Premiums. Based on current central estimates from DPB, JYF anticipates receiving an additional $188,325 in state general fund appropriations to support premium increases for general-funded positions, and will utilize $273,047 in non-general funds to support rate increases for the remaining NGF positions.

VI. Other Business

Mr. James called for any other business, and none was heard.

VII. Adjournment

There being no further business, Mr. James called for a motion to adjourn the meeting. Chief Adkins made a motion, which was seconded by Mrs. Bailey and approved by all. Mr. James officially adjourned the meeting.

Human Resources Metrics

Jamestown–Yorktown Foundation

Reporting period: October 1, 2025 – September 30, 2026

Workforce overview

The Foundation ended the reporting year with 283 employees, compared with 282 at the end of the preceding year. Overall staffing remained relatively stable, with an increase in classified employees and a decrease in wage employees.

Turnover improved in both employee groups. Wage turnover, departures during the first year of employment, recruitment for specialized positions, and retirement eligibility remain important workforce planning considerations. HR is reviewing exit interview information, has developed recruitment tools, and has begun succession planning work. Planned changes to the evaluation process will also strengthen training review and development accountability.

Workforce measure	Classified	Wage	Total
Employees at September 30, 2025	160	122	282
Employees at September 30, 2026	165	118	283
Average beginning and ending headcount	162.5	120.0	282.5

Turnover and retention

The Foundation recorded 65 agency departures, compared with 74 in the preceding year. Overall turnover decreased from 25.7% to 23.0%.

Employee group	Oct 2024–Sep 2025	Oct 2025–Sep 2026	Current-year departures
Classified	15.8%	13.5%	22
Wage	37.8%	35.8%	43
Overall	**25.7%**	**23.0%**	**65**

The Foundation’s classified turnover rate of 13.5% was approximately 1.2 percentage points below the DHRM statewide classified turnover reference of 14.7% for 2026.

Among employees working at the beginning of the reporting year, 84.0% remained continuously employed through year-end, compared with 80.6% during the preceding year.

Although overall retention improved, 28 departures occurred within the first year, compared with 17 in the prior year. These departures represented 43.1% of current-year departures; 22 involved wage employees.

Human Resources is reviewing exit interview information provided by departing employees to better understand their reasons for leaving and identify recurring themes. This review will inform further consideration of job expectations, scheduling, onboarding, supervisory support, and other aspects of the employee experience. Findings will be incorporated as the review progresses.

Recruitment and hard to fill positions

The Foundation received 1,165 applications, compared with 1,313 in the preceding year. Applications were distributed across more requisitions, resulting in fewer applications per requisition on average.

Recruitment measure	Prior reporting year	Current reporting year
Applications received	1,313	1,165
Requisitions receiving applications	62	69
Average applications per requisition	21.2	16.9
Median applications per requisition	17.5	12.0

Application volume decreased by 11.3%, while average applications per requisition decreased by 20.3%. This indicates a smaller recorded applicant pool per recruitment, although it does not by itself establish a change in applicant qualifications. Application counts are not counts of unique individuals; requisitions receiving no applications are not represented in the export.

Examples of recorded recruitment periods exceeding 60 days include:

Position	Position number	Recorded time to fill
Exhibit Fabricator Senior	JYF00157	62 days
IT Solutions Architect	JYF00187	64 days
Accounting & Admin Specialist	JYF00065	68 days
Financial Services Specialist	JYF00064	78 days

Human Resources has created a hiring manager checklist and standard operating procedures to clarify recruitment steps and responsibilities and support faster, more successful recruitments. These tools provide a consistent framework for hiring managers. Their effect on recruitment timelines and outcomes has not yet been measured.

Recruitment demographics

Among applications with reported gender information, 54.0% identified the applicant as male and 46.0% as female. These percentages are based on 792 applications with reported gender and exclude unknown, undisclosed, and blank responses.

Among the 755 applications with reported race information, the distribution was:

Reported race	Applications	Share of reported responses
White	576	76.3%
Black or African American	104	13.8%
Asian	40	5.3%
Two or more races	27	3.6%
American Indian or Alaska Native	7	0.9%
Native Hawaiian or Other Pacific Islander	1	0.1%

Across all 1,165 applications, 145 disclosed a current or past disability, representing 12.4%, and 60 identified protected-veteran status, representing 5.2%.

These measures describe the recorded applicant pool, rather than selection rates or hiring outcomes by demographic group. Protected-veteran status in the recruitment report differs from the broader veteran-status measure in the employee report.

Workforce and leadership diversity

The Foundation's workforce included 163 women and 119 men with reported gender information, representing 57.8% and 42.2%, respectively.

Gender	Workforce count	Workforce share	Leadership count	Leadership share
Female	163	57.8%	36	67.9%
Male	119	42.2%	17	32.1%
Total reported	**282**	**100.0%**	**53**	**100.0%**

Primary recorded race or ethnicity	Workforce employees	Leadership employees
White	231	45
Black or African American	29	6
Asian, including Asian Indian	4	1
Hispanic or Latino	4	1
American Indian	3	0
Native Hawaiian/Pacific Islander	1	0
Not specified	11	0
Total	**283**	**53**

This table uses each employee's primary recorded race or ethnicity field. Total diversity is approximately 18.7%

Recorded veteran and disability representation exceeded the agency benchmarks set by DHRM.

Measure	Workforce count	Workforce share	JYF benchmark	Leadership count	Leadership share
Veterans	27	9.5%	5.0%	7	13.2%
Employees identifying a disability	57	20.1%	7.0%	16	30.2%

Retirements and succession planning

The retirement eligibility report identifies 41 employees within its reporting scope through October 1, 2031. As of October 1, 2026, 36 of those employees were eligible for either reduced or unreduced retirement benefits.

Retirement eligibility	Employees	Percentage
Currently as of 10/1/2026	36	12.7
In the next 5 years	5	1.8
Total	**41**	**14.5**

During summer 2026, the HR summer intern developed and distributed a questionnaire to employees in critical roles who are eligible to retire within the next five years. This work began the succession planning process. Further work remains to review the information received, identify essential responsibilities and knowledge, assess coverage, and develop practical succession and knowledge-transfer plans. The questionnaire is an initial step; it does not represent a complete succession plan.

Training and professional development

The Foundation's training activity supported workplace expectations, safety, administrative effectiveness, and the knowledge and skills needed to deliver museum programs.

During the reporting year, the JYF learning-system export recorded 3,601 learning completions across 292 distinct content titles. These records include courses, events, and curriculum completions.

During the November 2026 self-evaluation process, employees will be asked to review their training records, self-report completion of required training, and identify further development needs. Supervisors will be required to acknowledge this review during the formal evaluation process due in February 2027, establish plans to complete missed required training, and hold employees accountable for further development.

This process will connect training review to performance discussions and give employees and supervisors shared responsibility for addressing gaps. Employee self-reports will provide additional information; they will not, by themselves, establish a verified agency-wide completion rate.

Employee support and workplace safety

Disability leave and workers' compensation information provide additional context on employee support and workforce availability. Human Resources reported the following short-term disability activity:

Period	Short-term disability cases
Calendar year 2025 — full year	15
Calendar year 2026 — year to date	11

The workers' compensation reports identify 17 claims with injury dates from October 1, 2025, through August 31, 2026.

Claim classification	Claims
Medical only	12
Indemnity	1
Reporting purposes only	4
Total	**17**

Reported causes include falls and slips, strains, contact with objects, and incidents involving tools or materials. These patterns support continued attention to walking surfaces, safe handling practices, tool use, and task-specific safety instruction.

Workforce priorities and next steps

Retention. Continue reviewing employee-provided exit interview information and use the findings to identify practical improvements to the early employment experience.

Recruitment. Use the new hiring manager checklist and standard operating procedures to support consistent, timely recruitment and assess their effect on hiring timelines and outcomes.

Succession planning. Build on the summer intern's questionnaire by reviewing responses and identifying critical responsibilities, knowledge-transfer needs, and succession coverage. Further planning remains necessary.

Training and development. Carry out the November employee training review and February supervisor follow-up. Establish plans to address missed required training and maintain accountability for further development.

Survey Performance

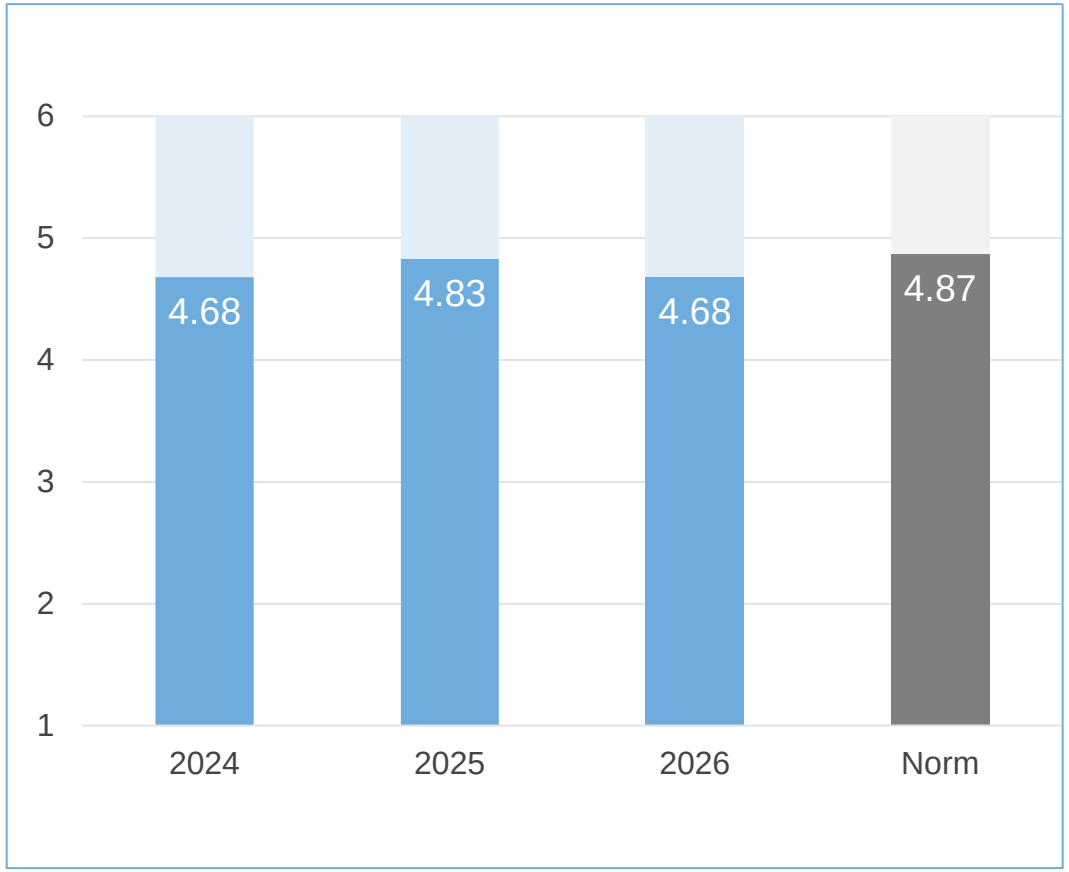
Engagement Index Score

Employee Engagement Item *(in order of performance vs. norm)* *(statistical significance = +/- 0.06 vs Norm; +/- 0.21 vs Historical Score)*	2026 Score	Diff. from 2025	Diff. From Norm	% Favorable
I am willing to put in effort beyond what is expected to help JYF be successful.	5.17	-0.06	-0.12	95%
I am proud to work for JYF.	5.06	-0.12	-0.08	91%
My effort directly affects the success of JYF.	5.06	-0.05	-0.04	95%
I feel I am a part of JYF's mission.	4.85	0.00	-0.01	90%
I often leave work with a feeling of satisfaction about my job.	4.48	-0.20	-0.13	84%
I would recommend employment at JYF to my friends.	4.32	-0.44	-0.46	81%
During the past six months, I have not seriously considered leaving JYF for another job.	3.84	-0.19	-0.44	58%
Employee Engagement	**4.68**	**-0.15**	**-0.18**	**85%**

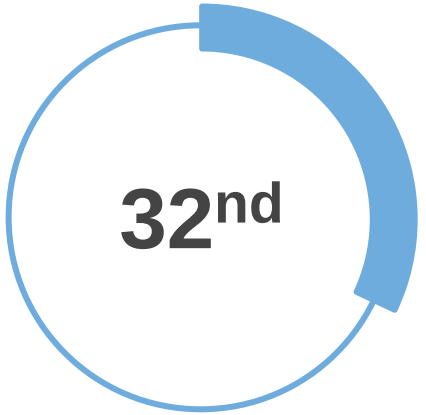
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Survey Performance

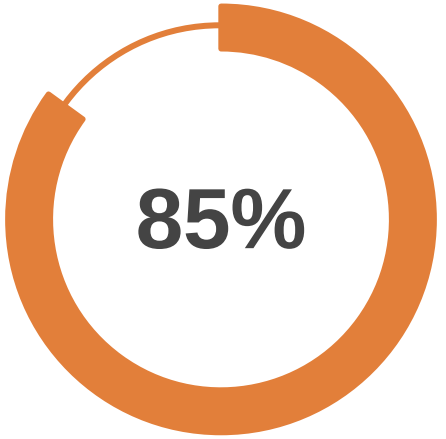
Engagement Index Score



Percentile Ranking
(44th 2025; 28th 2024)



Percent Favorable
(88% 2025; 85% 2024)



Norm 2025 = 4.88

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Survey Performance

Strengths – Improvements

Category	Survey Items *(in order of performance vs. 2025)*	2026 Score	Diff. From 2025	Diff. From Norm	Percentile	% Favorable
Supervisor	I value the relationship I have with my supervisor.	5.24	+0.11	+0.04	62nd	93%
Supervisor	My supervisor communicates well.	4.76	+0.09	-0.20	16th	86%
Supervisor	My supervisor recognizes my accomplishments.	5.01	+0.08	+0.05	54th	89%
Teamwork	Employees at JYF treat each other with respect.	4.54	+0.07	-0.33	23rd	85%
HR Programs	Human resources policies are administered consistently across JYF.	4.42	+0.03	-0.21	35th	79%

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Survey Performance

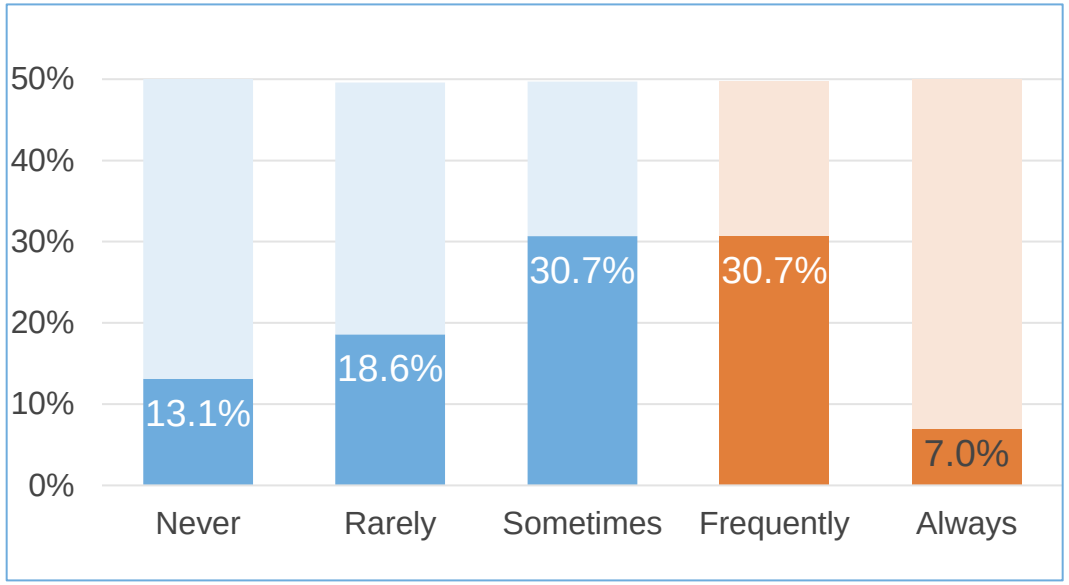
Opportunities – Least Favorable

Category	Survey Items *(in order of performance)*	2026 Score	Diff. From 2025	Diff. From Norm	Percentile	% Favorable
Work Environment	We have adequate staff in my department to do our jobs well.	3.26	-0.06	-0.73	10th	46%
HR Programs	Compared with similar jobs in this community, I feel I am paid fairly.	3.47	-0.18	-0.60	18th	55%
DOI	The process for career advancement/promotion is transparent to all employees.	3.48	-0.07	-0.76	0	57%
Work From Home	I am able to maintain focus on my job responsibilities with minimal work-related interruptions.	4.02	-0.23	-1.54	0	66%
Burnout/ Resilience	There are no significant, job-related barriers preventing me from doing my best.	4.03	-0.32	-0.57	7th	68%

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Survey Performance

Burnout/Resilience



Percent Burnout
(Always & Frequently)

38%

Burnout in 2025 = 30%; 2024 = 33%

Reasons Feeling Burned Out

- Most respondents report burnout driven primarily by chronic understaffing and unsustainable workloads—especially during peak seasons and heavy school-visit periods—compounded by frequent last-minute/poor planning, rapid project turnarounds, and repeated task overload. Additional themes: inadequate pay and benefits, lack of career growth or recognition, inconsistent communication and accountability across teams, frequent system/process changes (ticketing, dialogic methods) without sufficient training, and toxic interpersonal dynamics in some units. Many describe emotional exhaustion from constant public-facing labor and feeling their expertise and concerns are ignored, producing low morale, health impacts, and difficulty retaining staff.

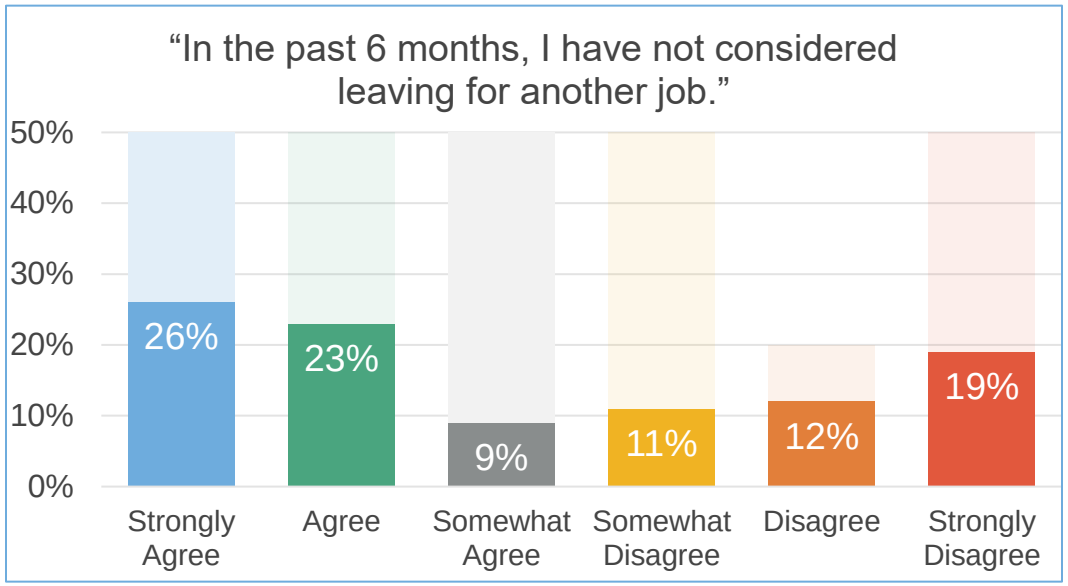
Groups Feeling Burned Out

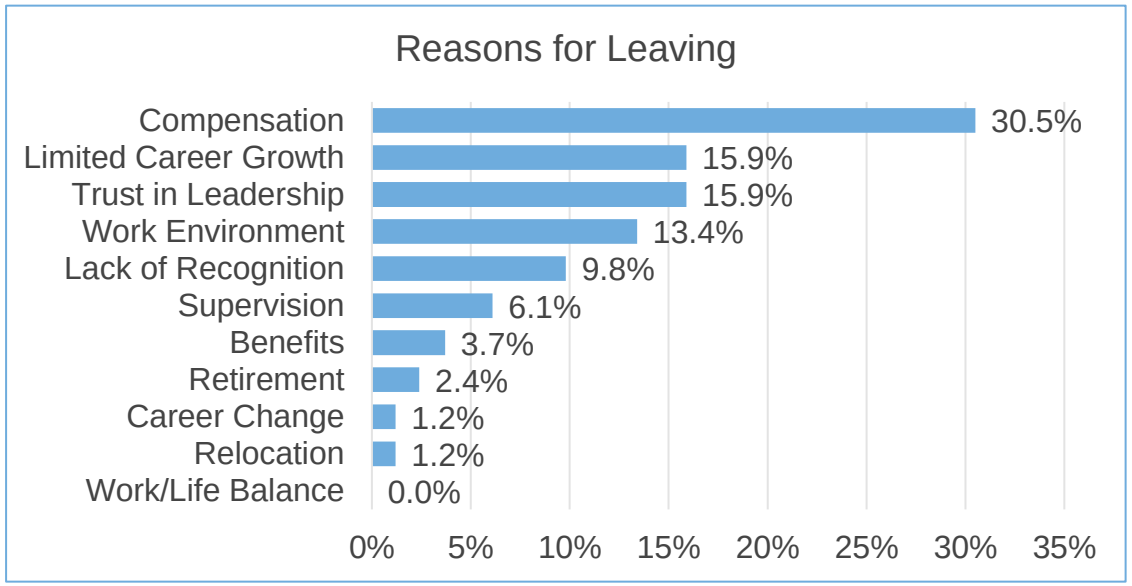
- 3 to 5 Years, 6 to 10 Years (Tenure)
- Yorktown (Location)
- Generation X (Generation)
- Director, Manager or Supervisor (Position)

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Survey Performance

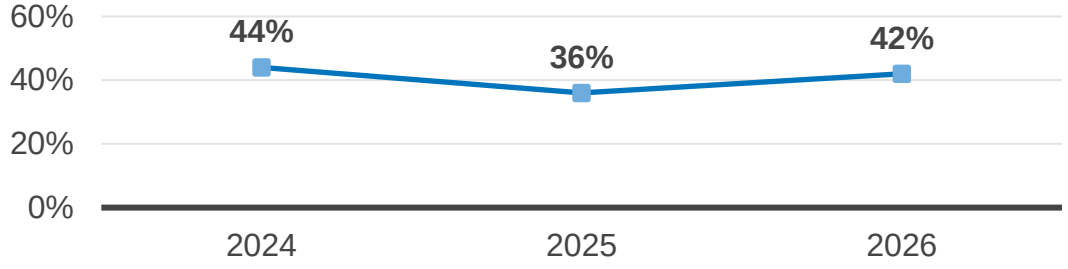
Intent to Stay





% Considering Leaving

(Strongly Disagree, Disagree, Somewhat Disagree)



Groups More Likely to Leave

- Yorktown (Location)
- 3 to 5 Years, 6 to 10 Years (Tenure)
- Professional, Skilled Maintenance, Service and other Clerical (Position)
- Marketing & Public Relations (Parent Department)
- Generation Z, Millennials (Generation)

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Norm = 32%

Survey Performance

Prioritize Your Actions

Systemic Opportunity	What It Addresses	Action Ideas
Staffing & Workload Sustainability	Understaffing, workload pressure, burnout, interruptions	• Conduct workforce planning to align staffing with peak demand and operational needs • Redesign scheduling and coverage models to reduce overload and last-minute changes • Prioritize workload and eliminate or streamline non-essential tasks and processes • Establish clear escalation paths for workload capacity issues across departments • Implement regular workload and staffing reviews to proactively adjust resources
Career Growth, Pay & Advancement Transparency	Limited growth, unclear advancement, perceived pay inequity, retention risk	• Define and communicate clear career paths, promotion criteria, and progression steps • Conduct market pay analysis and address gaps in compensation competitiveness • Expand development opportunities including training, mentoring, and cross-functional exposure • Create internal mobility processes and communicate available opportunities consistently • Increase transparency and communication around how advancement and pay decisions are made
Leadership Communication, Trust & Cross-Department Alignment	Low trust, poor communication, lack of follow-through, silos	• Standardize communication expectations across leadership levels for consistency • Improve cross-department coordination through structured planning and shared goals • Establish feedback loops and visibly act on employee input from surveys and teams • Provide leadership training focused on communication, accountability, and inclusion • Increase transparency on decisions, priorities, and organizational changes

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Jamestown-Yorktown Foundation
Executive and Finance Committees

Wednesday, November 10, 2026
American Revolution Museum at Yorktown
Classrooms A-B-C or Virtual Via Teams
2:45 PM

The Honorable Thomas K. Norment, Jr.
Chair, Executive Committee

The Honorable Delores L. McQuinn,
Chair, Finance Committee

Mrs. Sue H. Gerdelman,
Vice Chair, Executive Committee

Senator Ryan T. McDougle
Vice Chair, Finance Committee

AGENDA

I. Call to Order – Senator Norment

II. Approval of Minutes – Senator Norment *(Action Required)*
Sept. 3, 2026
p. 105

III. FY 2027 YTD Financial Report – Delegate McQuinn
p. 109

IV. FY 2028 Budget Planning & Priorities – Delegate McQuinn
p. 113

V. FY2028 Operating and Capital Budget Requests
p. 119

VI. Other Business – Senator Norment

VII. Adjournment – Senator Norment *(Action Required)*

Committee Members Present:	Mr. A. Marshall Acuff, Jr., Chief Stephen R. Adkins, Delegate Betsy B. Carr, Mr. M. Kirkland Cox, Mr. H. Benson (Ben) Dendy III, Delegate Buddy Fowler, Jr., Mrs. Sue H. Gerdelman, General Michael Harrison (Remote), Senator Mamie E. Locke (Remote), Mrs. Anne Marie Morgan, Senator Ryan T. McDougle, Delegate Delores L. McQuinn, Senator Thomas K. Norment (Remote), Mr. Kenneth R. Plum (Remote).
Committee Members Absent:	Senator Louise Lucas, Speaker Donald L. Scott, Jr., and Delegate Luke D. Torian.
JYF Staff/Guests:	Ms. Christy Coleman, Ms. Abigail Gump (Remote), Dr. Mariruth Leftwich, Ms. Lisa Lucas, Dr. Juliet Machie, Ms. Jennifer McCullough, Mr. Coy Mozingo (Remote), Ms. Melissa Thompson and Mrs. Glenda Turner.

I. Call to Order

Vice Chair Sue H. Gerdelman called the meeting to order at 12:09 p.m. and welcomed members of the Executive and Finance Committees. She noted that the meeting was being conducted in a hybrid format in accordance with applicable provisions of Virginia law governing electronic meetings. Lisa Lucas conducted the roll call and confirmed the presence of an in-person quorum for the Executive Committee. While a quorum was not established for the Finance Committee, the Executive Committee was authorized to proceed with all action items. Senator Thomas K. Norment participated remotely.

II. Approval of Minutes

The minutes of the May 7, 2026, meeting were presented for consideration. Upon motion duly made and seconded, the minutes were approved as submitted.

III. Executive Director's Report

Christy Coleman presented the Executive Director's Report and provided an overview of current organizational priorities and operations. She reviewed the Foundation's annual Electronic Meeting Policy, noting that state law requires annual adoption of the policy. Following discussion, the Executive Committee approved the Electronic Meeting Policy for the coming year.

IV. Jamestown-Yorktown Educational Trust Report

Marshall Acuff presented the Jamestown-Yorktown Educational Trust Report and summarized actions taken during the Trust's June 29 meeting. He reported that the Trust Board had authorized the issuance of a Request for Proposals for operation of the Jamestown Settlement Café following the expiration of the current contract at the end of 2026, and that submitted proposals were under review. He further reported that an assessment process had been initiated regarding potential termination of the vendor contract for the 1781 Café at the American Revolution Museum at Yorktown. Mr. Acuff noted that the Trust had approved the FY2027 Budget and adopted revised investment policies establishing the Trust as its own Investment Authority. In addition, the Board authorized up to $300,000 for development of a potential traveling exhibition related to *Outlander*. He concluded by highlighting strong museum retail performance during FY2026, with revenues exceeding $3.6 million, the highest level achieved since 2008 and noted continued positive performance at the beginning of FY2027. No committee action was required.

V. Jamestown-Yorktown Foundation, Inc. Update

General Michael T. Harrison, Sr. provided an update regarding activities of the Jamestown-Yorktown Foundation, Inc., including current initiatives and priorities. Discussion followed. No committee action was required.

VI. FY2026 and FY2027 Financial Report

On behalf of Will Nixon, Jennifer McCullough presented the financial report. Ms. McCullough reviewed FY2026 year-end financial results, reporting paid visitation of approximately 435,000 visitors, representing 98.9 percent of budget and more than three percent growth over FY2025. Total revenues were reported at $26.3 million, with admissions revenue exceeding budget projections. Expenditures totaled $23.5 million and reflected personnel vacancies and deferred expenditures from restricted and designated balances. She then reviewed July FY2027 financial activity, noting revenues of $3.2 million and expenditures of $2.8 million. Admissions revenue totaled approximately $653,000, while affiliate support levels reflected fiscal year-end timing and reimbursement associated with dredging activities. Personnel expenditures remained within expected projections. Ms. McCullough presented the FY2027 Budget Adjustments and Carryforward Plan, including restricted balances, designated balances, valid encumbrances, and newly authorized General Fund support for Museum Operations and Education staffing. Recommendations also included establishment of a self-replenishing ADA operational reserve, replacement funding for Digital Media Services equipment, and replenishment of the operational contingency fund. Upon motion duly made and seconded, the Executive Committee approved the FY2027 Budget Adjustments and Carryforward Plan.

VII. Committee Reports

Administration and Personnel Committee

Delegate Buddy Fowler provided the Administration and Personnel Committee report and reviewed current administrative and personnel matters. No action was required.

Buildings and Grounds Committee

Chief Stephen R. Adkins reported on current facilities and capital projects. He noted the expansion of the previously approved roofing initiative to include Living History structures, resulting in a comprehensive campus-wide project valued at more than $8.6 million. Chief Adkins also reported that construction on the Jamestown Settlement Lobby Flooring and Renovation Project would begin on October 12, requiring temporary visitor access modifications. He reviewed progress on deferred maintenance projects funded through a $5.5 million appropriation and outlined future capital needs totaling more than $10 million for infrastructure improvements, accessibility upgrades, and additional deferred maintenance priorities.

Marketing Committee

Anne Marie Morgan presented the Marketing Committee report and provided updates on marketing initiatives and activities. No action was required.

Nominating Committee

H. Benson Dendy III presented the Nominating Committee report and announced the appointments of Delegates Jessica Anderson, Gretchen Bulova, and Alfonso Lopez to the Board of Trustees. He also introduced gubernatorial appointees Sue H. Gerdelman, Ervin L. Jordan Jr., Lana Real, and James Wheaton, whose terms will extend through 2030. Mr. Dendy recognized departing trustees Jamie Burke, Charles James, and Gloria Marrero, who will be honored at the November Board meeting. He also welcomed William L. Murray as an elected trustee and reminded members that officer elections will be conducted at the November Board meeting, in accordance with the bylaws.

Public Programming and Acquisitions Committee

Delegate Betsy Carr presented the Public Programming and Acquisitions Committee report. She reported that educational programming exceeded annual goals, serving more than 153,000 students during FY2026, and noted strong reservations for the upcoming academic year. Delegate Carr highlighted several successful public programs and events, including the Declaration of Rights Dinner, Civically Yours Family Day, the Star-Spangled Cookout, and the First Africans Commemoration. She also

reported on the opening of *Give Me Liberty: Virginia & the Forging of a Nation* at the American Revolution Museum at Yorktown and recognized national award recognition received by *Following the Dragon* at Jamestown Settlement. Additional updates included maritime programming activities, participation of the *Godspeed* in Sail250 events, restoration efforts involving the *Susan Constant*, and recent artifact acquisitions and conservation projects, including completion of the acquisition of the Peale Polk portrait of George Washington.

VIII. Other Business

Vice Chair Gerdelman invited additional business from the Committees. No further business was presented. Members were reminded that the Fall Board Meeting will be held on November 10, 2026, at the American Revolution Museum at Yorktown.

IX. Adjournment

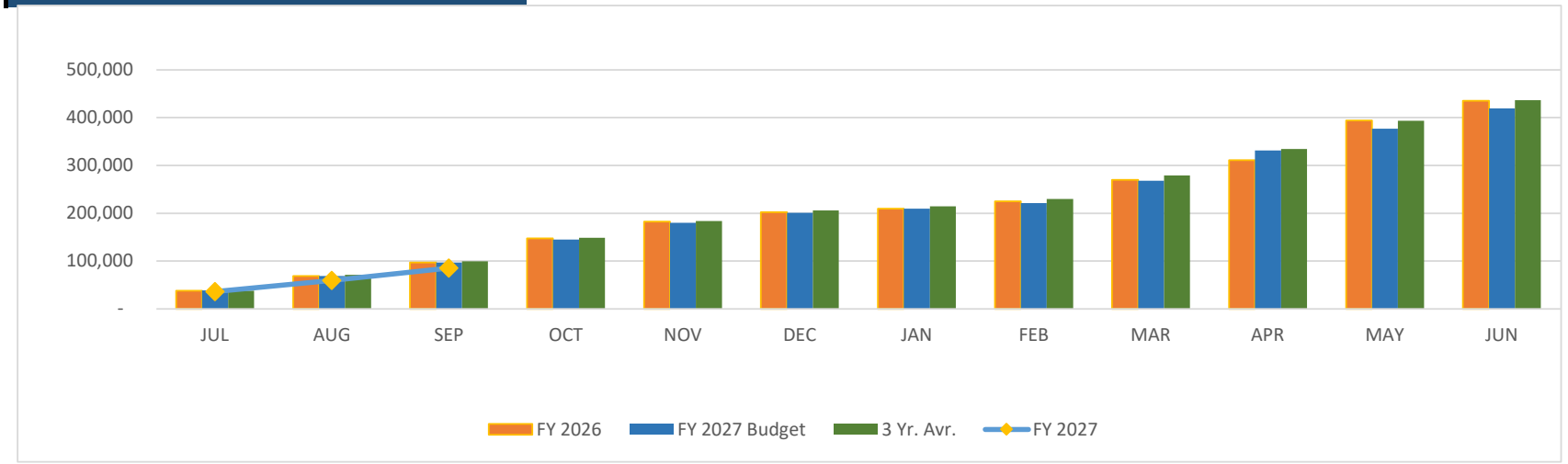
There being no further business to come before the Committees, a motion to adjourn was made and approved by the Executive Committee. The meeting adjourned at 1:53 p.m.

Jamestown-Yorktown Foundation

September 2026

KEY METRICS	VISITATION	REVENUE	ADMISSIONS	EXPENDITURES	PERSONNEL	NON-PERSONNEL
Current Value	85,258	$ 9,167,588	$ 1,730,291	$ 6,976,038	$ 4,997,735	$ 1,978,304
Period	this year	this year	this year	this year	this year	this year
%	20.3%	34.3%	28.6%	26.1%	26.2%	26.0%
Difference vs.	(333,928) vs. budget	$ (17,548,557) vs. budget	$ (4,315,981) vs. budget	$ (19,740,107) vs. budget	$ (14,101,435) vs. budget	$ (5,638,671) vs. budget
5 Yr Trend	5 Yr Trend	5 Yr Trend	5 Yr Trend	5 Yr Trend	5 Yr Trend	5 Yr Trend

VISITATION - Cumulative

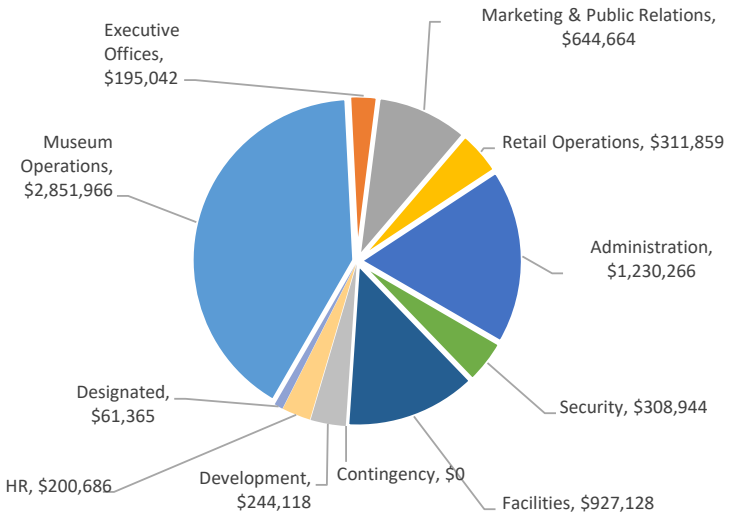


	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
FY 2027	36,064	59,245	85,258	-	-	-	-	-	-	-	-	-
Budget	38,557	68,442	97,207	144,721	180,302	200,925	209,390	221,340	268,282	331,383	376,925	419,186
FY 2026	37,923	68,497	96,664	147,276	182,177	202,121	209,849	224,763	269,540	311,240	394,072	435,601
3 Yr. Avg	37,906	70,853	99,393	148,801	183,968	205,913	214,297	229,717	279,325	334,555	393,336	436,862

Jamestown-Yorktown Foundation

September 2026

Expenditure by Departments



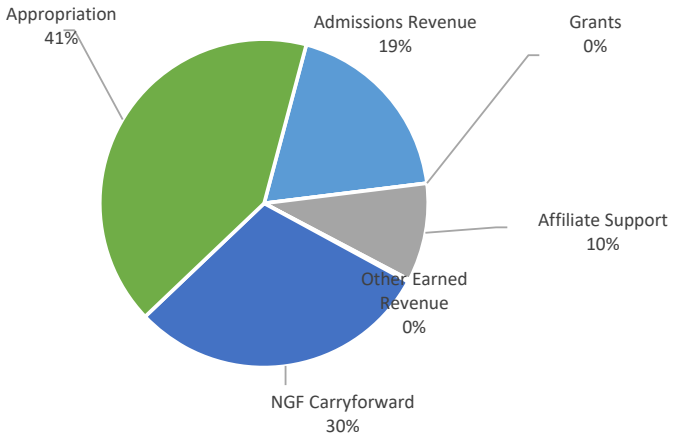
Key Expenditures vs. Budget

Salaries	$	3,027,085	27.4%
Wages	$	502,087	19.7%
Benefits & Health Care	$	1,468,562	26.6%
Advertising	$	328,730	32.9%
IT & Telecomm	$	326,729	25.3%
Prod & Skilled Services	$	60,937	4.9%
Maint & Repair	$	129,771	27.9%
Security	$	220,293	34.1%
Utilities	$	306,527	32.6%

Revenues vs. Budget

Jamestown Admissions	$	1,193,105	28.7%
Yorktown Admissions	$	537,187	28.5%
Outreach/Distance	$	3,994	3.2%
After Hours, Summer	$	15,716	44.9%
Affiliate Support, Misc	$	886,521	23.8%
Other Revenue	$	9	0.0%
Total Earned Revenue	$	2,636,531	26.5%
Recognized State	$	3,785,229	27.0%

Revenues



Jamestown-Yorktown Foundation

Statement of Revenues and Expenditures

As of 9-30-2026

Line	Revenue	Current Year Actual	Total Budget	Variance to Total Budget	Percent of Budget	Prior Year Actual	Variance to Prior Year	Percent of Prior Year
1	Earned Revenues							
2	Jamestown Admissions	$ 1,193,105	$ 4,159,770	$ (2,966,665)	28.7%	$ 1,041,892	$ 151,212	114.5%
3	Yorktown Admissions	537,187	1,886,502	(1,349,315)	28.5%	533,422	3,765	100.7%
4	Total Admissions	$ 1,730,291	$ 6,046,272	$ (4,315,981)	28.6%	$ 1,575,314	$ 154,977	109.8%
5	Grants	-	-	-	N/A	-	-	N/A
6	Outreach	3,994	125,325	(121,331)	3.2%	-	3,994	N/A
7	After Hrs, Summer Camps	15,716	35,000	(19,284)	44.9%	4,000	11,716	392.9%
8	Affiliate Support & Misc	886,521	3,730,776	(2,844,255)	23.8%	408,275	478,246	217.1%
9	Other Revenue	9	-	9	N/A	-	9	N/A
10	Total Earned Revenues	$ 2,636,531	$ 9,937,373	$ (7,300,842)	26.5%	$ 1,987,590	$ 648,942	132.6%
11								
12	NGF Carryforward	2,745,828	2,745,828	-	100.0%	3,387,798	(641,970)	81.1%
13	Recognized State Approp	3,785,229	14,032,944	(10,247,715)	27.0%	3,268,433	516,796	115.8%
14								
15	**Total Revenue**	**$ 9,167,588**	**$ 26,716,145**	**$ (17,548,557)**	**34.3%**	**$ 8,643,821**	**$ 523,768**	**106.1%**
16								
17	**Expenditure**							
18	Personnel Costs							
19	Salary	$ 3,027,085	$ 11,030,098	$ 8,003,013	27.4%	$ 2,920,390	$ 106,695	103.7%
20	Benefits	733,927	2,725,334	1,991,407	26.9%	757,105	(23,178)	96.9%
21	Health Care	734,636	2,796,104	2,061,469	26.3%	621,318	113,318	118.2%
22	Wages	502,087	2,547,634	2,045,547	19.7%	521,094	(19,006)	96.4%
23	Total Personnel Costs	$ 4,997,735	$ 19,099,170	$ 14,101,435	26.2%	$ 4,819,906	$ 177,828	103.7%
24	Advertising	328,730	1,000,500	671,770	32.9%	128,577	200,153	255.7%
25	Insurance, Bank Fees, Audit	304,993	518,942	213,949	58.8%	171,661	133,332	177.7%
26	IT & Telecomm	326,729	1,292,222	965,493	25.3%	427,888	(101,159)	76.4%
27	Maintenance & Repair	129,771	464,914	335,143	27.9%	67,924	61,847	191.1%
28	Production & Skilled Services	60,937	1,240,433	1,179,496	4.9%	105,229	(44,292)	57.9%

Line		*Current Year Actual*	*Total Budget*	*Variance to Total Budget*	*Percent of Budget*	*Prior Year Actual*	*Variance to Prior Year*	*Percent of Prior Year*
29	Security	220,293	646,007	425,714	34.1%	200,150	20,143	110.1%
30	Travel, Training, Lodging	57,129	327,784	270,655	17.4%	37,742	19,386	151.4%
31	Utilities	306,527	939,000	632,473	32.6%	191,073	115,454	160.4%
32	Equipment, Fixed Assets	145,988	475,081	329,094	30.7%	243,404	(97,417)	60.0%
33	Other	97,207	712,092	614,885	13.7%	55,634	41,573	174.7%
34	Total Non-Personnel Costs	$ 1,978,304	$ 7,616,975	$ 5,638,671	26.0%	$ 1,629,283	$ 349,021	121.4%
35	**Total Expenditure**	**$ 6,976,038**	**$ 26,716,145**	**$ 19,740,107**	**26.1%**	**$ 6,449,189**	**$ 526,849**	**108.2%**
36								
37	**Net Revenue**	**$ 2,191,550**	**$ -**	**$ 2,191,550**	**N/A**	**$ 2,194,632**	**$ (3,082)**	**99.9%**

JAMESTOWN-YORKTOWN FOUNDATION
BOARD OF TRUSTEES
EXECUTIVE & FINANCE COMMITTEES
FY2028 BUDGET PLANNING & PRIORITIES

INTRODUCTION:

The annual operating budget for the Jamestown-Yorktown Foundation (JYF) is derived from three primary sources: Admissions and earned revenues, general fund support from the Commonwealth of Virginia (State), and affiliate support from the JYF, Inc., and the Jamestown-Yorktown Educational Trust. Each entity develops and approves its respective budget through independent governance processes; together, these budgets fund the collective operations, programs, and strategic initiatives of JYF.
The general process for the development and approval of all three JYF budgets is represented on the chart below:

BUDGET DEVELOPMENT PROCESS:



Consistent with prior years, the FY2028 Budget will be designed to sustain the Jamestown-Yorktown Foundation's core operations while advancing its strategic priorities. These priorities include staffing resources, program excellence, innovation, capital and maintenance reserve investment. Our overarching goal is to ensure that the budget functions as an effective management and planning tool, translating JYF's mission and strategic vision into actionable financial priorities.

Each year's baseline operating plan is informed by the Commonwealth of Virginia's biennium budget (FY26–FY28), estimated non-general fund revenue performance, historical operating expenditures and departmental requests and observations. This approach allows JYF to maintain financial stability while adapting to emerging needs and economic conditions.

The FY2028 Budget Planning process will commence in December with budget orientations for all budget holders, ensuring a shared understanding of fiscal expectations and strategic objectives. The three JYF budgets, State, Inc., and Trust will continue to be developed in tandem to ensure coordination and resource alignment across entities. Additionally, in FY2028 a matrix will be deployed to consolidate certain expenditures to certain budgets to reduce risk and streamline operations.

Following the submission of departmental requests, the Finance team and senior leadership will hold a series of structured review meetings with department heads and budget holders to refine and prioritize requests. Once refined, the Executive Director and Leadership Team will evaluate the consolidated budget to achieve overall balance and ensure alignment with institutional goals.

After internal review and reconciliation, the proposed FY2028 Budget will be presented to the Executive & Finance Committee for analysis and recommendations, followed by final review and approval by the full Board of Trustees at the spring meeting. This structured process ensures transparency, accountability, and collaborative decision-making at every stage of the budget life cycle.

PRIORITIZING EXISTING OPERATIONAL RESOURCES

As the starting point for FY2028, budget holders, senior leadership and the Finance Office will review FY2027 budgets and resources. Requests should do the following;

- Protect essential services and obligations. Give first call on existing funding to maintaining safe public operations, educational and visitor services, collections stewardship, mandated controls, utilities, and preventive maintenance before discretionary enhancements.

- Align staff time and spending with demand. Review schedules, wage hours, vacancies, and workloads by site and program. Use flexibility and cross-training where practical while documenting structural capacity gaps.

- Review recurring commitments. Examine contracts, software subscriptions, supplies, travel, equipment support, and other controllable costs for opportunities to consolidate, phase, or redirect spending without weakening services or compliance.

- Rank repairs and replacements by risk. Use condition assessments, maintenance history, audit requirements, and service disruptions to direct available resources to the most consequential facilities and technology needs.

- Maintain discipline across funding sources. Align costs with permissible state, JYF, Inc., and Educational Trust support, use realistic earned-revenue assumptions, and retain flexibility as actual results and funding decisions evolve.

PROPOSED FY2028 BUDGET PLANNING PRIORITIES

The following priorities represent aspirational goals for the FY2028 budget, developed to position the Jamestown-Yorktown Foundation for long-term success pending the availability of funding. These initiatives reflect the agency's ongoing commitment to advancing its mission through thoughtful investment in people, programs and communication, while maintaining strong fiscal discipline. Each priority area aligns with JYF's strategic plan and represents an opportunity to strengthen operational capacity, enhance the visitor experience and ensure the Foundation's continued leadership in history education and cultural tourism. Final funding decisions will depend on state appropriations, revenue performance and other available resources, but the vision remains clear, to sustain excellence, innovation, and stewardship across all areas of operation.

The following planning priorities have been identified as the most critical for funding considerations moving into FY2028.

1. Human Capital and Workforce Sustainability

Personnel remains JYF's largest operating investment. Increased school visitation, hard-to-fill roles, statewide compensation actions, and JYF's reliance on nongeneral funds create continuing recruitment, retention, and capacity pressures.

Planning considerations include:

- Accommodate and address state mandated compensation and benefit adjustments.
- Maintain and improve effective staff deployment by recruiting and retaining qualified employees to address vacancies, expand operational capacity, and ensure sufficient staffing to meet peak school and visitor demand.
- Prioritize the proposed 12-position educational staffing expansion, including 10 Living History Interpreters, a School Programs Coordinator, an Education Communications Specialist, additional wage hours, and targeted wage adjustments to meet student and visitor demand.
- Address essential security, facilities, maritime, and compliance needs through the proposed seven-position support request, including state-mandated cybersecurity responsibilities and opportunities to reduce contracted vessel-maintenance costs.
- Support market-informed compensation, training, succession planning, and employee well-being while recognizing that statewide salary actions also draw on JYF's limited nongeneral fund resources.

2. Program Investment and Audience Growth

Following Virginia's 250th anniversary observances in 2026, FY2028 offers an opportunity to sustain heightened public interest in early American history and convert anniversary engagement into lasting school, community, and visitor participation.

Planning considerations include:

- Direct existing education and marketing resources toward programs with strong school and community reach, visitor demand, and measurable mission or earned-revenue impact.

- Strengthen staffing and program delivery to serve more students and educators through on-site visits, distance learning, and professional development opportunities statewide.

- Use targeted marketing, community partnerships, and accessible programming to sustain visitation, strengthen the visitor experience, and support admissions and other earned revenues beyond the VA250 commemorative period.

- Strengthen fundraising and nongeneral fund revenue through the proposed Chief Development Officer and Development Researcher support, expanding donor cultivation and funding opportunities for programs and future capital needs.

3. Critical Infrastructure, Life Safety, and Energy Efficiency

The 2025 Facilities Condition Assessment and ongoing operations identify significant system-renewal needs across JYF's state-owned campuses. The proposed FY2028 capital plan emphasizes the risks and costs of delaying essential repairs.

Planning considerations include:

- Use available maintenance resources first for life-safety work, preventive maintenance, and repairs that avoid closures or major failures, guided by the 2025 Facilities Condition Assessment.

- Advance the proposed $10,172,372 in one-time FY2028 capital funding to address critical facility infrastructure needs, life-safety, accessibility, and deferred maintenance needs across its three campuses. This investment builds on the Commonwealth’s $5.5 million FY2027, while prioritizing projects that prevent closures and emergency repairs.

- Coordinate facilities lifecycle planning and preventive maintenance with the Buildings & Grounds Committee's capital improvement plan and the findings of the 2025 assessment.

- Advance a proactive, long-term approach to facility management that prioritizes strategic infrastructure investments, enhances energy efficiency, safeguards visitors and employees, and reduces lifecycle costs through preventive maintenance and responsible stewardship of agency assets.

- Continue planning for the Jamestown Master Plan within available capital and institutional resources.

4. Technology Modernization and Cybersecurity

Reliable collections systems, cybersecurity, and sound IT governance are essential to protecting state assets, meeting Commonwealth standards, and delivering museum programs.

Planning considerations include:

- Prioritize current IT resources for required security controls, critical systems support, software lifecycle management, and data protection while reviewing lower-priority technology spending.

- Pursue the proposed $845,000 in one-time funding to replace the outdated collections management system, improving collections stewardship, research capabilities, operational efficiency, and access to JYF’s collections.

- Meet cybersecurity, information security, and ARMICS internal-control obligations without continuing to redirect limited instructional and operational resources from other priorities.

- Continue advocating for transparent, sustainable VITA cost allocation while strengthening data protection, access controls, continuity planning, and cross-campus technology resilience.

5. Equipment Replacement and Exhibit Renewal

Aging audiovisual systems in galleries, theaters, classrooms, and interactive exhibits at both museums are increasingly prone to failure, disrupting educational programming, limiting interpretive experiences, and diminishing the overall visitor experience. Renewal must be phased to address urgent operational risks without duplicating funding requests.

Planning considerations include:

- Use existing exhibit and audiovisual maintenance resources to stabilize high-impact failing systems and rank replacements by service disruption, visitor impact, and lifecycle cost.

- Advance the proposed $23.47 million phased AV modernization program, beginning with a $3.02 million FY2028 first phase targeted to high-priority failing systems and independently useful improvements.

- Integrate exhibit and audiovisual replacement schedules with capital planning and lifecycle assessment, rather than assuming a separate ongoing AV operating reserve in the FY2028 request.

- Coordinate with Development to identify restricted gifts and partnerships that complement, rather than replace, necessary Commonwealth investment in state-owned exhibits and systems.

The FY2028 budget will begin with deliberate prioritization of existing operating resources, with requests for additional operating and capital support identified separately. As legislative outcomes, revenue estimates, and actual spending become clearer, staff will align Commonwealth and affiliate contributions and adjust proposed commitments to maintain fiscal flexibility.

Jamestown-Yorktown Foundation
FY2028-2030 Operating and Capital Budget Requests

Request Title	Priority No	Funding Source	Requested Funding	Legislative Summary	FY2028	FY2029	FY2030
Operating Requests							
Expansion of Educational Museum Staffing	1	Operating GF	$1,024,245 ongoing MEL 12	JYF requests $1,024,245 in ongoing general fund support to restore educational capacity through 12 classified positions and targeted wage support. The plan adds an Education Communication Specialist, who will focus on outreach to increase awareness, participation, and engagement, a School Programs Coordinator, and 10 Living History Interpreters with a school-program focus, with two assigned to each principal living-history area. Funding also provides 3,450 additional wage hours and establishes an $18.50 base rate with compression adjustments. Increasing school and self-guided visitation places additional demands on staffing and limits statewide educational access. Because approximately half of JYF operations rely on nongeneral funds, statewide compensation adjustments also draw on scarce internal resources. Funding will expand school-program capacity, improve recruitment and retention, and reduce the need to turn away student groups.	$1,024,245	$1,024,245	$1,024,245
Expand Support Staff Security and Facility Operations	1	Operating GF	$747,317 ongoing MEL 7	JYF requests $747,317 in ongoing general fund support for seven classified positions and targeted wage support to meet security, facilities, maritime, and regulatory obligations. Two Maritime Technicians will reduce outsourced vessel maintenance; the request also converts Security Captain and Lieutenant functions to classified positions, funds a previously unfunded VITA-required Information Security Officer, restores a Gardener and Custodian, adds seasonal housekeeping, and supports required ARMICS testing. These investments reduce contracting costs and compliance risks, protect visitors and state assets, and prevent mandated functions from diverting resources from education.	$747,317	$747,317	$747,317
Replace Collections Management and Agency Systems	2	Operating GF	$845,000 One-time	JYF requests $845,000 in one-time funding to replace Vernon CMS, the more than 20-year-old system used to manage over 210,000 objects and artifacts. The current platform does not meet current VITA data requirements. Its outdated architecture also separates digital assets from collection records and requires fragmented, manual workflows. A modern web-based CMS will strengthen data security, preservation, search, reporting, collaboration, and public access, supporting exhibitions, education, conservation, research, and loans. Should procurement of the replacement CMS produce savings, remaining funds could also support an evaluation of an enterprise resource planning (ERP) system to identify opportunities for broader operational improvements.	$845,000	$0	$0
Fundraising Support and Nongeneral Fund Revenue Generation	3	Operating GF	$377,666 ongoing MEL 1	JYF requests $377,666 in ongoing general fund support to stabilize the existing Chief Development Officer position and add a Development Researcher. These roles cultivate support for education, collections, capital improvements, and institutional priorities, reducing pressure on state resources. Increasingly restricted donations leave fewer unrestricted affiliate dollars to sustain core development capacity. State investment, consistent with peer museum funding models, will expand research, major and planned giving, and future capital campaign readiness while preserving flexible charitable funds for programs and emerging needs.	$377,666	$377,666	$377,666

Capital Requests							
Critical Facility Infrastructure, Life Safety, Accessibility, and Maintenance Improvements	1	Capital	$10,172,372 one-time	JYF requests $10,172,372 in one-time FY2028 capital funding to address critical facility infrastructure, life-safety, accessibility, and maintenance needs across its three campuses. This investment builds on the Commonwealth's $5.5 million FY2027 allocation to remediate the highest-risk deficiencies identified in the 2025 Facilities Condition Assessment. Of the requested amount, $8,510,317 will fund replacement of failing HVAC and mechanical systems, repairs to deteriorating doors and windows, building envelope improvements, parking lot rehabilitation, lighting upgrades to improve illumination and energy efficiency, and exterior painting. An additional $1,662,055 will support prioritized renovations at Jamestown Settlement to address ADA and accessibility needs, improve traffic flow, and upgrade lighting and infrastructure in the area connecting the lobby to the café. Design work for these improvements is already complete. Café-specific renovation components will be funded separately through enterprise funds from the Jamestown-Yorktown Educational Trust.	$10,172,372	$0	$0
Museum Gallery and Audio-Visual Renewal	2	Capital	$23,467,278 one-time phased	JYF requests $23,467,278 in phased one-time capital funding to replace obsolete and failing audiovisual systems at Jamestown Settlement and the American Revolution Museum at Yorktown. These systems are essential to the museums' exhibitions, educational programs, and accessible visitor experiences. Critical theater, interactive, classroom, and accessibility technologies have already failed or are approaching failure, disrupting museum operations and limiting the delivery of interpretive content. The first independently functional phase ($3,021,567 in FY2028) addresses urgent needs. Subsequent phases ($12,730,497 in FY2029 and $7,715,214 in FY2030) renew integrated technology and support infrastructure. This phased approach will restore operational reliability, reduce costly emergency repairs and disruptions, improve accessibility, and protect the Commonwealth's investment in museum exhibitions, educational experiences, and earned revenue.	$3,021,567	$12,730,497	$7,715,214
				Subtotal One-Time Funding	$14,038,939	$12,730,497	$7,715,214
				Subtotal Ongoing Funding	$2,149,228	$2,149,228	$2,149,228
				Total	**$16,188,167**	**$14,879,725**	**$9,864,442**

Funding Source Summary

Funding Source	FY2028	FY2029	FY2030	Total
Operating General Fund	$2,994,228	$2,149,228	$2,149,228	$7,292,684
Capital General Fund	$13,193,939	$12,730,497	$7,715,214	$33,639,650
Total	**$16,188,167**	**$14,879,725**	**$9,864,442**	**$40,932,334**