

**Legislative Oversight Committee**  
South Carolina House of Representatives  
Post Office Box 11867  
Columbia, South Carolina 29211  
Telephone: (803) 212-6810 • Fax: (803) 212-6811



# **Restructuring & Seven-Year Plan Report Guidelines**

February 27, 2015

# COMMITTEE INFORMATION

## *Committee Information*

### **House Legislative Oversight Committee**

Post Office Box 11867

Columbia, South Carolina 29211

**Telephone** 803-212-6810

**Fax** 803-212-6811

Also, the agency may visit the South Carolina General Assembly Home Page (<http://www.scstatehouse.gov>) and click on "Citizens' Interest" then click on "House Legislative Oversight Committee Postings and Reports". This will list the information posted online for the Committee; click on the information the agency would like to review.

<http://www.scstatehouse.gov/citizens.php> (Click on the link for "House Legislative Oversight Committee Postings and Reports.")

# OVERVIEW: RESTRUCTURING & SEVEN-YEAR PLAN

## *Background*

Pursuant to Section 1-30-10(G)(1), state department and agency governing authorities must submit the following to the Governor and General Assembly:

- “reports giving detailed and comprehensive recommendations for the purposes of merging or eliminating duplicative or unnecessary divisions, programs, or personnel within each department to provide a more efficient administration of government services.” (Annual Restructuring Report, Restructuring Report or ARR)

Pursuant to Section 1-30-10(G)(2), state department and agency governing authorities must submit the following to the Governor and General Assembly:

- “a seven-year plan that provides initiatives and/or planned actions that implement cost savings and increased efficiencies of services and responsibilities within the projected seven-year period.” (Seven-Year Plan)

These questions and instructions are provided for the purposes of fulfilling the agency’s requirement to the House Legislative Oversight Committee under these statutes. **Please note the agency’s response will be published on the General Assembly’s website.**

In completing these documents, having a copy of the Fiscal Year 2012-13 Accountability Report and Fiscal Year 2013-14 Accountability Report the agency submitted to the Executive Budget Office will be helpful.

## *Submission Process*

Please complete the information and answer the questions included on the following pages. Please note at the end there is a request to complete an Excel document with the name of all personnel at the agency who were consulted or performed work to obtain the information utilized when answering the questions in these reports, their title and their specific role in answering the question (i.e., searched the agency documents, asked for information because they are in charge of the department, etc.). Therefore, for efficiency purposes, the agency may want to keep track of this information while answering the questions instead of waiting until the end.

All forms should be submitted electronically by **March 31, 2015**, to the House Legislative Oversight Committee ([HCommLegOv@schouse.gov](mailto:HCommLegOv@schouse.gov)) in both the original format (Word and Excel) and saved as a PDF for online reporting. The signed copy of the Submission Form with a hard copy of the forms and attachments should be mailed to: House Legislative Oversight Committee, Post Office Box 11867, Columbia, South Carolina 29211. Please direct any questions about this process to Jennifer Dobson ([jenniferdobson@schouse.gov](mailto:jenniferdobson@schouse.gov)) or Charles Appleby ([charlesappleby@schouse.gov](mailto:charlesappleby@schouse.gov)).

# OVERVIEW: RESTRUCTURING & SEVEN-YEAR PLAN

## *Efforts to Avoid Duplication*

Please note at the end of each page in this report, the Committee includes the following:

Does the agency already provide the information requested on this page, or similar information, in a report required by a legislative entity? If yes, add the appropriate information to the **Similar Information Requested Chart**. If the agency look in the Excel document attached, there is a template for the agency to complete for any questions which ask for the same information under the tab labeled, "Similar Info Requested."

In the Excel document attached, there is a template to complete any questions which ask for the same information under the tab labeled, "Similar Information Requested." The Committee asks this at the end of every page because if the questions on that page seek information similar to information sought in another report to a legislative entity, we want to know so we may communicate with the legislative entity who requires the other report and determine the most efficient way to avoid duplication in the future.

In addition, notice that one section of this report requests the agency list all other reports it has to submit. The Committee is seeking this information to analyze and determine whether there are any recommendations the Committee may make, in collaboration with the other entities which require reports, in an effort to minimize the burden of all the reporting requirements on the agency while still ensuring all appropriate information is provided.

## *Looking Ahead*

The Restructuring Report, Seven-Year Plan and Oversight Study process are new for 2015. Each year the Committee will review information sought from agencies, the methods through which it is sought and any feedback received from agencies. Through this review, it is the Committee's goal to continually improve its processes and obtain greater effectiveness and efficiency for agencies and the Committee through revisions and updates both in the information it receives and way in which it is collected. The Committee looks forward to working with agencies to provide the most effective and efficient state government for the people of South Carolina.

# RESTRUCTURING & SEVEN-YEAR PLAN

*Insert Agency Name*

Date of Submission: *Insert Date*

Please provide the following for this year's Restructuring and Seven-Year Plan Report.

	Name	Date of Hire	Email
<b>Agency Director</b>	Robert M. Burdette	November 2010	<a href="mailto:MBurdette@PatriotsPoint.org">MBurdette@PatriotsPoint.org</a>
<b>Previous Agency Director</b>	Dick Trammell	September 2009	Not on File

	Name	Phone	Email
<b>Primary Contact:</b>	Robert M. Burdette	843-881-5922	MBurdette@PatriotsPoint.org
<b>Secondary Contact:</b>	Ray Chandler	803-435-8847	RChanatty6@aol.com

Is the agency vested with revenue bonding authority? (re: Section 2-2-60(E))	YES
--	-----

I have reviewed and approved the enclosed 2015 Restructuring and Seven-Year Plan Report, which are complete and accurate to the extent of my knowledge.

**Current Agency Director** Patriots Point Development Authority

(Sign/Date):

(Type/Print Name):

Robert M. Burdette

**If applicable,  
Board/Commission  
Chair**

(Sign/Date):

(Type/Print Name):

Ray Chandler

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# EXECUTIVE SUMMARY

## I. Executive Summary

### A. Historical Perspective

1. Please complete the **Historical Perspective Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Historical Perspective." In this chart the Committee is asking the agency to provide a bullet style list of any major changes in the agency's purpose or mission and any restructuring that occurred (i.e., combining with or taking on other agency responsibilities, etc.) during the last ten years.

### B. Purpose, Mission and Vision

1. Please complete the **Purpose/Mission/Vision Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Purpose, Mission." The other specifics are included in the template.

### C. Key Performance Measure Results

1. After completing the Key Performance Measurement Processes Section of this Report, please come back to this question and provide a summary of the results (bullet style results only, explanations should be included in the Key Performance Measurement Processes Section).
  - Primary measurements are related to numbers of customers (visitors to the museum, group visitors, overnight guests, land lease productivity) and our annual and long term revenue.
  - Goals and objectives are established by the Authority's Three Year Business Plan and executed through our Departmental work plans and the annual budget.
  - Increase ticket sales by 10,000 annually through the end of 2018 to achieve our goal of 300,000 tickets sold annually. In 2018 we will consider market penetration in the Charleston Tourism market, the economy, and other factors before setting our next measurable goal. We follow the same process for overnight camping, retail sales, event rentals, etc.
  - Perhaps the most important measurement is projections of revenue from the land lease. Management of land lease revenue is key to long term management of ship maintenance and restoration. Appraisals have established the annual lease revenue at \$5 million annually by 2027.

- Other measurements involve customer confidence in our products. We use various surveys and evaluations to measure customer confidence in our products. We use paid greeters to take one on one discussion surveys on a weekly basis.
- We maintain contact with other similar attractions through Historic Ships of North America. Our goal is to remain number three of all Naval & Maritime Museums in terms of tickets sold annually. There are a total of five aircraft carrier museums nationally. We are one of only several museums with three capital warships. These various numbers are located in different size markets which make it different to measure against their success.
- We measure pricing for services, admission and goods locally.

## ORGANIZATIONAL PROFILE

### *II. Organizational Profile*

This section asks for a fact based description of the agency. Please provide information in the stated Excel template. If an Excel template is not referenced, provide the information in bullet style.

1. The agency's main deliverables (i.e., products or services) and the primary methods by which these are provided;
  - a. Complete the **Key Deliverables Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Key Deliverables."
2. The agency's key customers and their requirements and expectations;
  - a. Complete the **Key Customers Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Key Customers;"
3. The agency's key stakeholders (other than customers);
  - a. Complete the **Key Stakeholders Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Key Stakeholders;"
4. Other state agencies which have the biggest impact on the agency's mission success;
  - a. Complete the **Key Partner Agency Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Key Partner Agencies."
5. The agency's performance improvement system(s);
  - Annual evaluations of personnel by Departments.
  - Annual evaluations of Departments by Executive Director.
  - Review of program towards achieving goals and objectives contained in Departmental Work Plans and Three Year Business Plan.
  - Surveys and evaluations completed by customers relative to visitation to the Museum, overnight camping guests, event rentals, and food service customers.

Does the agency already provide the information requested on this page, or similar information, in a report required by another entity? If yes, add the appropriate information to the **Similar Information Requested Chart**. If the agency looks in the Excel document attached, there is a template for the agency to complete for any questions which ask for the same information under the tab labeled, "Similar Info Requested."



- Contact with various S.C. House and Senate Office staff members and Governor's staff.
- Review of data from other similar attractions (i.e. ticket sales).
- Review of industry standards for museum through contact with museum design consultants.
- Mid-year budget review by Executive Director and Department Managers.
- Weekly review of internal data relative to customer numbers and revenue compared to previous year.
- After action reports and meetings following important programs or events.

6. The agency's organizational structure in flow chart format;

**SEE 'ATTACHMENT C'**

\*Please Note: This Attachment would not format correctly onto this digital report; therefore, it is only being submitted with the Hard Copy version of this report.

7. Details about the body to whom the Agency Head reports;

- a. Complete the **Overseeing Body Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Overseeing Body-General" and "Overseeing Body-Individual Member."

8. Please complete the **Major Program Areas Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Major Program Areas."

9. Please identify any emerging issues the agency anticipates may have an impact on its operations in the upcoming five years.

- Completing and approving land lease for approximately 48 acres of property for 99 years to ensure long term maintenance/repair of historic warships. Will need to create revenue fund of \$400 million dollars over 99 years.
- Increasing ticket sales by 40,000 over next three years.

# ORGANIZATIONAL PROFILE

## *III. Laws (Statutes, Regulations, Provisos)*

This section asks for state and federal statutes, regulations and provisos ("Laws") which apply to the agency.

1. Please complete the **Legal Standards Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Legal Standards." In this Chart, please list all state and federal statutes, regulations and provisos that apply to the agency ("Laws"). The other specifics are included in the template.

## *IV. Reports and Reviews*

This section asks for information about reports the agency is required to submit to a legislative entity and the agency's internal review process.

1. Please complete the **Agency Reporting Requirements Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Agency Reporting Requirements." In this Chart, please list all reports, if any, the agency is required to make to a legislative entity. The specifics as to each report are included in the template.
2. Please complete the **Internal Audit Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Internal Audits."

# RESTRUCTURING REPORT

## *V. Key Performance Measurement Processes*

This category examines the agency's performance and improvement in key areas. Performance levels are examined relative to those of competitors and other organizations providing similar programs and services. Information is typically displayed by the use of performance measures. Quantitative measures may be supplemented by a discussion of qualitative measures where appropriate; however, every effort should be made to use appropriate quantitative measures that can be charted to show trends and comparisons to benchmarks.

Address only top-level results showing aggregate measures of agency-wide performance that are reflective of the value added to customers. Please include comparative data as applicable. These results are typically captured in performance goals and planning documents. When determining which processes are "key processes" consider the business impacts, and select those processes that are most important to the customer (both internal and external) to satisfy their requirements and/or those processes with problem areas identified by management.

Note: Results information (i.e., each chart, graph, table) reported for this category should be referenced to the specific question number (Ex. Chart 5.1-1, Graph 5.1-2, Table 5.1-3). The third digit identifies the sequential position of the specific chart, graph or table included in the agency's responses to each questions.

**For each performance measurement included in response to the questions on the next page under Subsection A, please provide the following information:**

- a. The performance goal(s)/benchmark(s) for the overall process output, and/or critical activities that produce the output.
  - i. Three agency/government entities in other states or non-government entities the agency considers the best in the country in this process or similar process and why.
  - ii. If the agency did not use results from an entity the agency listed in response to "i" as a performance goal/benchmark, why not and why did the agency choose the goal/benchmark it did?
  - iii. Individual(s) who are not employed by the agency (government or non-government, located anywhere in the country) whom the agency considers an expert in the process or similar process and their contact information, or if deceased, name of books authored.
- b. List the senior leaders who review the performance measure, their title and frequency with which they monitor it.
- c. Trends the agency has seen and the method by which it analyzes trends in these results.
- d. Whether the agency has reasonable control over this result (i.e., more than 50% or enough to be able to influence and accurately measure the result).
  - i. If the agency does not have reasonable control over this result, the other one or more agencies, who when combined with the agency, together have reasonable control over the result and names of those other agencies.

# RESTRUCTURING REPORT

## V. Key Performance Measurement Processes (cont.)

**SEE 'ATTACHMENT A'**

### A. Results of Agency's Key Performance Measurements

#### Mission Effectiveness

1. What are the agency's actual performance levels for two to four of the agency's key performance measurements for mission effectiveness (i.e., a process characteristic indicating the degree to which the process output (work product) conforms to statutory requirements (i.e., is the agency doing the right things?))?

#### Mission Efficiency

2. What are the agency's actual performance levels for two to four of the agency's key performance measurements for mission efficiency (i.e., a process characteristic indicating the degree to which the process produces the required output at minimum resource cost (i.e., is the agency doing things right?)) including measures of cost containment, as appropriate?

#### Quality (Customer Satisfaction)

3. What are the agency's actual performance levels for two to four of the agency's key performance measurements for quality (i.e., degree to which a deliverable (product or service) meets customer requirements and expectations (a customer is defined as an actual or potential user of the agency's products or services)) for the agency as a whole and for each program listed in the agency's Major Program Areas Chart?

#### Workforce Engagement

4. What are the agency's actual performance levels for two to four of the agency's key performance measurements for workforce engagement, satisfaction, retention and development of the agency's workforce, including leaders, for the agency as a whole and for each program listed in the agency's Major Program Areas Chart?

#### Operational/Work System Performance

5. What are the agency's actual performance levels for two to four of the agency's key performance measurements for operational efficiency and work system performance (includes measures related to the following: innovation and improvement results; improvements to cycle or wait times; supplier and partner

performance; and results related to emergency drills or exercises) for the agency as a whole and for each program listed in the agency's Major Program Areas Chart?

Does the agency already provide the information requested on this page, or similar information, in a report required by another entity? If yes, add the appropriate information to the **Similar Information Requested Chart**. If the agency looks in the Excel document attached, there is a template for the agency to complete for any questions which ask for the same information under the tab labeled, "Similar Info Requested."

# RESTRUCTURING REPORT

## V. Key Performance Measurement Processes (cont.)

### B. Most Critical Performance Measures

1. Of the key performance measurement processes listed in Subsection A., which are the three most critical to achieving the overall mission of the agency?

### C. Databases/Document Management

1. List all electronic databases/document management/business intelligence systems or programs utilized by the agency, including, but not limited to all relational database management systems.

### D. Recommended Restructuring

Consider the process taken to review the agency's divisions, programs and personnel to obtain the information contained in response to all the previous questions in the Restructuring Report ("Process").

1. Yes or No, based on the information obtained and analysis performed during the Process, does the agency have any recommendations for restructuring (either that it could do internally or that would need the assistance of revised or new legislation) that would merge or eliminate duplicative or unnecessary divisions, programs, or personnel within each department of the agency to provide a more efficient administration of government services?
  - a. If yes, please provide the agency's suggestions.

# SEVEN-YEAR PLAN

## VI. Seven-Year Plan

**SEE 'ATTACHMENT B'**

### A. General

1. Yes or No, does the agency have a plan that provides initiatives and/or planned actions the agency will take during the next seven fiscal years that implement cost savings and increased efficiencies of services and responsibilities in order to continually improve its ability to respond to the needs of the state's citizens?

If yes, go to Current/Recommended Actions Section.

If no, skip Current/Recommended Actions Section and go to Additional Questions.

### B. Current/Recommended Actions

1. Describe all of the actions the agency is currently taking and plans it has for initiatives and actions during the next seven fiscal years to work to achieve greater efficiency in its operations in order to continually improve its ability to respond to the needs of the state's citizens? In this description, provide the names of all personnel who are responsible for overseeing the actions and plans.
2. What are the anticipated cost savings and/or efficiencies that would be achieved by each action?
3. Is legislative action required to allow the department/agency to implement the current or recommended actions?
4. If legislative action is required, please explain the constitutional, statutory or regulatory changes needed.
5. Describe the agency actions that will be implemented to generate the desired outcomes for each recommendation.
6. What is the timeline for implementation of the change and realization of the anticipated benefits for each recommended action/change?

Now go to Additional Questions.

## VI. *Seven-Year Plan (cont.)*

### C. Additional Questions

1. What top three strategic objectives of the agency will have the biggest impact on the agency's effectiveness in accomplishing its mission?
2. What are the fundamentals required to accomplish the objectives?
3. What links on the agency website, if any, would the agency like listed in the report so the public can find more information about the agency?
4. Is there any additional information the agency would like to provide the Committee or public?
5. Consider the process taken to review the agency's divisions, programs and personnel to obtain the information contained in response to all the previous questions in the Restructuring Report and Seven-Year Plan ("Process"). State the total amount of time taken to do the following:
  - a. Complete the Process
  - b. Complete this Report
6. Please complete the **Personnel Involved Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Personnel Involved." Please list the name of all personnel at the agency who were consulted or performed work to obtain the information utilized when answering the questions in the Restructuring and Seven-Year Plan Report and their title and their specific role in answering the question (i.e., searched the agency documents, asked for information because they are in charge of the department, etc.).



# CHARTS APPENDIX

## VII. Excel Charts

Please send an electronic copy of the entire Excel Workbook and print hard copies of each of the Charts to attach here. Please print the charts in a format so that all the columns fit on one page. Please insert the page number each chart begins on below.

Similar Information Requested Chart _____	EX. 1
Historical Perspective Chart _____	EX. 2
Purpose, Mission Chart _____	EX. 3
Key Products Chart _____	EX. 4
Key Customers Chart _____	EX. 5
Key Stakeholders Chart _____	EX. 6
Key Partner Agency Chart _____	EX. 7
Overseeing Body Chart (General and Individual Member) _____	EX. 8, EX. 9
Major Program Areas Chart _____	EX. 10
Legal Standards Chart _____	EX. 11
Agency Reporting Requirements Chart _____	EX. 12
Internal Audits Chart _____	EX. 13
Personnel Involved Chart _____	EX. 14

Does the agency already provide the information requested on this page, or similar information, in a report required by another entity? If yes, add the appropriate information to the **Similar Information Requested Chart**. If the agency looks in the Excel document attached, there is a template for the agency to complete for any questions which ask for the same information under the tab labeled, "Similar Info Requested."

# 'ATTACHMENT A'

## **V. Key Performance Measurement Process**

### **A. Results of Agency's Key Performance Measurement**

#### **1. Mission Effectiveness:**

- b. Increase ticket sales to sustain operations. In three and a half years we have increased ticket sales by 20%, increasing the revenue stream by \$2 million.
- c. Increased marketing budget by more than 50% to better sell our product.
- d. Completed Master Plan to bring the ship museum into the 21<sup>st</sup> century which is improving the product instituted a 'rolling' three years museum plan to ensure that the agency stays on track with the Board's vision.

#### **2. Mission Efficiency:**

- a. Recognizing that overnight camping numbers were reduced. Completed surveys of past customers, resulting enhanced product: Patriots Point Flight Academy opened in 2014 resulting in increase in camping numbers by 1,700 campers.
- b. Fourth of July in past had resulted in little revenue. The agency moved the fireworks event off the ship so that the agency could sell tickets for the flight deck. We annually earn more than \$50,000 for this single event.

#### **3. Quality (Customer Satisfaction)**

- a. Patriots Point now conducts tourist surveys annually through the University of South Carolina to gauge customer satisfaction of the general customer base.
- b. Patriots Point conducts surveys of each camping group and each event customer (340 each year) to determine customer satisfaction.

#### **4. Workforce Engagement**

- a. We employ team concept for all projects and events. All state holder staff members are empowered to submit ideas and critical thinking to the process.
- b. Staff meetings are conducted weekly by the Executive Director to receive input. Each department is expected to also conduct weekly work sessions based upon the departmental annual work plan. We have this "all hands" meetings in the auditorium and two meetings with all volunteers.

#### **5. Operational/Work System Performance**

- a. Staff and all levels are integrated with system consultants to design interactive exhibits using technology. The Vietnam Experience which opened in November 2014 is an example. It is immersive and interactive using state of the art technology, sound, and video to create an experience. Over fifteen employees were involved in the design and visionary elements of its creation.

The new Vietnam Experience has more than tripled the number of visitors received in general.

## **B. Most Critical Performance Measures**

### **1. Key Performance Measures**

**\* PPDA Board Members review this performance measure**

- Tickets sold annually
- Overnight camping registrations annually
- Maintenance of ships and exhibits
- The improvement of our product through 21<sup>st</sup> century technology
- Following the Three Years Business Plan

## **C. Databases/Document Management**

1. Galaxy
2. SCEIS
3. SAP

## **D. Recommended Restructuring**

1. **No**, we have no recommendations for restructuring. We would suggest treating PPDA more like the State Ports Authority relative to procurement since we are an enterprise agency.

## ‘ATTACHMENT B’

### **VI. Seven-Year Plan**

#### **A. General**

1. No. (We have a 3 Year Plan)

#### **B. N/A**

#### **C. Additional Questions**

1. **Long Term Sustainment:**

- a. Leasing of Agency Property
- b. Improvement of the product (museum/tourist destination)
- c. Marketing/ Selling the product
- d. Maintenance and Restoration of 70 year old war ships
- e. Keeping skilled/ Experienced employees

2. **Whatever fundamentals required to accomplish:**

- a. An improvement of the museum product and increased expenditure on marketing and increase ticket sales to 300,000 annually by the end of 2018.
- b. Negotiate lease for 48 acres of property
- c. Eliminate conservation easements on property
- d. Communication with members of the General Assembly and Budget and Control Board

3. **SCPRT/ Museum Commission/ State Museum**

4. **We are an enterprise agency designed to be self-sustaining. We receive no annual appropriations from the General Assembly. We employ a 3 Year Plan to guide budget and strategic decisions.**

5.
  - a. 30 Days
  - b. 1 Day

6. See ‘**Personnel Involved Chart**’

INSTRUCTIONS: Please provide details about other reports which investigate the information requested in the Restructuring Report. This information is sought in an effort to avoid duplication in the future. In the columns below, please list the question number in this report, name of the other report in which the same or similar information is requested, section of the other report in which the information is requested, name of the entity that requests the other report and frequency the other report is required. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Restructuring Report Question #	Name of Other Report	Section of Other Report	Entity Requesting Report	Freq. Other Report is Required
Patriots Point Development Authority	N/A	N/A	N/A	N/A	N/A

**INSTRUCTIONS:** Please provide information about any restructuring or major changes in the agency's purpose or mission **during the last ten years**. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Year	Description of Restructuring that Occurred	Description of Major Change in Agency's Purpose or Mission
Patriots Point Development Authority	2015	None	None

Purpose/Mission/Vision Chart

INSTRUCTIONS: Provide information about the date the agency, in its current form, was initially created and the present purpose, mission and vision of the agency, with the date each were established in parentheses. The Legal Standards Cross Reference column should link the purpose, mission and vision to the statutes, regulations and provisos listed in the Legal Standards Chart, which they satisfy.

Agency Submitting Report	Date Agency created	Purpose	Mission	Vision	Legal Standards Cross References
PPDA	1975	To develop Patriots Point to provide a place of recreation and education, to establish and develop a National Naval Museum, to stimulate travel and increase tourism to the region and the state.	Fostering patriotism and pride in the American nation and its military, establishing Patriots Point as an attractive travel destination to stimulate the economy and to establish a national ship museum to help future generations to a better understanding of the service and sacrifice of our military.	Patriots Point will become a self sustaining agency for operational capital costs within fifteen years, and will not require any funding allocations from the S.C. General Assembly. We will complete the lease of all PPDA property and the development of the most unique Naval and Maritime Museum in the nation. The Yorktown will be restored pursuant to the 2015 structural assessment by 2030.	Purpose: 51-13-710 Mission: 51-13-710 Vision: 51-13-710

Key Deliverables Chart

**INSTRUCTIONS:** Provide information about the agency's key deliverables (i.e. products or services), primary methods by which these are delivered, and, as applicable, actions that may reduce the general public and/or other agencies initial or repetitive need for the deliverable. List each deliverable on a separate line. If there are multiple ways in which the deliverable is provided, list the deliverable multiple times with each delivery method on a separate line. In the "Three Greatest" column, indicate and rank the three most significant deliverables the agency brings to the people of South Carolina with #1 being the most significant. For the deliverables which are not one of three most significant, do not put anything in this column. The Major Program Areas Cross References Column should link the deliverable to the major program area in the Major Program Areas Chart, within which that product or service is provided. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Item #	Deliverable (i.e. product or service)	Three Most Significant (#1, #2, #3)	Primary Method of Delivery	What can be done to reduce the general public and/or other agencies initial need for this deliverable? (i.e. preventive measures before the citizen or agency needs to come to the agency)	What can be done to reduce the general public and/or other agencies need to return for this deliverable? (i.e. preventive measures to ensure they do not need to come back to the agency for this service or product after already receiving it once)	If deliverable is identified as one of the three most significant, what would allow the agency to focus on it more?	Major Program Areas Cross Reference
PPDA	1	Educate Public regarding Naval & Maritime history and coastal sciences	1, 3, 4	The display of naval ships. The offering of educational programs. Display of ships. Use of technology to tell Veterans stories, educational programs, events honoring Veterans	Nothing. We want the Public to desire to visit.	N/A	N/A	N/A
PPDA	2	Honor the service of Veterans		Management of 360 acres of land at Patriots Point for the development of uses to attract visitors.	Nothing. We want Veterans to visit.	N/A	N/A	N/A
PPDA	3	Promote destination for visitors to South Carolina		Manage property to create perpetual flow of revenue for shop maintenance. Develop product desired by Public and market.	Nothing. We want tourists to make this a destination.	N/A	N/A	N/A
PPDA	4	Develop perpetually self sustaining organization			This is essential to success of Patriots Point.	N/A	N/A	N/A
	5							
	6							



## Key Customers Chart

**INSTRUCTIONS:** Provide information about the key customer segments identified by the agency and each segment's key requirements/expectations. A customer is defined as an actual or potential user of the agency's deliverables. Please be as specific as possible in describing the separate customer segments (i.e. do not simply put "public.") The Deliverables Cross References column should link customer groups to the deliverable listed in the Key Deliverables Chart, which they utilize. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Item #	Customer Segments	Requirements/Expectations	Deliverables Cross References
PPDA	1	Tourists	Value for price of ticket, educational, entertaining	1, 3, 4
PPDA	2	Veterans	Inspirational exhibits, videos, events that honor	1, 2, 4
PPDA	3	Students/Educators	Curriculum based educational programs	1, 4
PDA	4	Overnight groups	History/science programs; good meals; excellent accommodations	1, 3, 4
PPDA	5	Event planners	Price for space rental; efficient service; interesting venue	3, 4
	6			

INSTRUCTIONS: Provide information about the agency's key stakeholder groups and their key requirements and expectations. A stakeholder is defined as a person, group or organization that has interest or concern in an agency. Stakeholders can affect or be affected by the agency's actions, objectives and policies. Please be as specific as possible in describing the separate stakeholder groups (i.e. please do not simply put "the public.") The Deliverables Cross References column should link stakeholder groups to the deliverable, listed in the Key Deliverables Chart, for which they group has the most interest or concern. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Item #	Stakeholder Group	Requirements/Expecations	Deliverables Cross References
PPDA	1	Veterans Groups	Accurate representation of history, programs, events	1, 2, 3, 4
PPDA	2	Tourism Organizations	High level of positive visibility; increase attendance	1, 2, 3, 4
PPDA	3	Spirit Line Cruises	Sustain operation; increase attendance, dock space	1, 3, 4
PPDA	4	Tenants	Sustainment of operation; increase attendance	1, 3, 4
	5			
	6			

INSTRUCTIONS: List the names of the other state agencies which have the biggest impact on the agency's mission success (list a minimum of three); partnership arrangements established and performance measures routinely reviewed with the other entity. The Major Program Areas Cross References Column should link the Partner Agency to the major program area, in the Major Program Areas Chart, on which it has the biggest impact. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable and a minimum of three.

Agency Submitting Report	Agency w/ Impact on Mission Success	Partnership Arrangement Established	Performance Measures Routinely Reviewed Together	Major Program Areas Cross Reference
Patriots Point Development Authority	N/A	N/A	N/A	N/A

Overseeing Body - General Chart

INSTRUCTIONS: Provide information about the body that oversees the agency and to whom the agency head reports including what the overseeing body is (i.e. board, commission, etc.); total number of individuals on the body; whether the individuals are elected or appointed; who elects or appoints the individuals; the length of term for each individual; whether there are any limitations on the total number of terms an individual can serve; whether there are any limitations on the number of consecutive terms an individual can serve; and any other requirements or nuances about the body which the agency believes is relevant to understanding how the agency performs and its results.

Agency Submitting Report	Type of Body (i.e. Board, Commission, etc.)	# of Times per Year Body Meets	Total # of Individuals on the Body	Are Individuals Elected or Appointed?	Who Elects or Appoints?	Length of Term	Limitations on Total Number of Terms	Limitations on Consecutive Number of Terms	Challenges imposed or that Agency staff and the Body have faced based on the structure of the overseeing body	Other Pertinent Information
PPDA	Enterprise agency governed by an appointed board	12	9	Appointed	Various	4 years	N/A	N/A	Political Support Statewide	

## Overseeing Body - Individual Members Chart

**INSTRUCTIONS:** Provide information about the individual members on the body that oversees the agency including their name, contact information, length of time on the body, profession and whether they are a Senator or House Member. The Major Program Areas Cross References Column should link the individual to the major program area, in the Major Program Areas Chart, in which the individual has a particular influence, if any, by way of serving on a subcommittee within the body, task force, etc. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Name of Individual on Body	Contact Information	Profession	Date First Started Serving on the Body	Last Date Served on the Body	Length of Time on the Body (in years)	Senator or House Member? (put Senate or House)	Major Program Areas Cross Reference
PPDA	Ray Chandler	<a href="#">PO Box 1292, Manning, SC 29102</a>	Attorney	Jan-12	Currently Serving	3	Governor	N/A
PPDA	Wayne Adams	<a href="#">PO Box 221, Columbia, SC 29414</a>	Marketing	Jan-12	Currently Serving	3	Speaker of House	N/A
PPDA	Susan Marlowe	<a href="#">10 Fernadina St., Mt. Pleasant, SC 29464</a>	Educator	Dec-07	Currently Serving	9	Senate Protempore	N/A
PPDA	Zeb Williams	<a href="#">PO Box 11489, Columbia, SC 29211</a> <a href="#">231 N. Ainsdale Dr., Charleston, SC 29414</a>	Attorney	Mar-11	Currently Serving	4	Governor	N/A
PPDA	Linda Bennett	<a href="#">427 Greenbriar Ln., Charleston, SC 29412</a>	Service Contractor	Dec-11	Currently Serving	3	Speaker of House	N/A
PPDA	Edward Taylor	<a href="#">233 S. Pine St., Spartanburg, SC 29302</a>	Developer	Sep-10	Currently Serving	4.5	Senate Protempore	N/A
PPDA	Spencer King	<a href="#">100 Ann Edwards Ln., Mt. Pleasant, SC 29464</a>	Attorney	Nov-13	Currently Serving	1.5	Governor	N/A
PPDA N/A	Mayor Linda Page N/A	N/A	Mayor of Mt. Pleasant N/A	Nov-13	Currently Serving N/A	1.5 N/A	Elected Official N/A	N/A N/A

**INSTRUCTIONS:** Provide information about the agency's Major Program Areas as those are defined in the Appropriations Act. When completing columns B - K, the agency can copy and paste the information the agency submitted in the Program Template of the FY 2013-14 Accountability Report, just make sure of the following:

- a) List only the programs that comprise at least 60% of the total budget and include the % of total budget. The remainder of the programs should be "listed ONLY" in the box labeled "Remainder of Expenditures." If the agency has trouble understanding what is requested, refer to the 2012-13 Accountability Report, Section II, number 11.
- b) The "Associated Objectives" column in the Program Template of the FY 2-13-14 Accountability Report has been changed to "Key Performance Measures Cross References." The Key Performance Measures Cross References column should link major programs to charts/graphs in the Key Performance Measurement Processes Section (ex. Chart 5.2-1 or Graph 5.2-2). If the agency has trouble understanding what is requested, refer to the 2012-13 Accountability Report, Section II, number 11; and
- c) An additional column, titled "Legal Standards Cross References," has been added at the end. The Legal Standards Cross Reference column should link major programs to the statutes, regulations and provisions listed in the Laws Section of this report, which they satisfy. Included below is an example, with a partial list of past Major Program Areas from the Department of Transportation. The example does not include information in the columns under expenditures. Key performance measures cross reference, legal standards cross references or remainder of expenditures, however, the agency must complete these columns when submitting this chart in final form. Please delete the example information before submitting this chart in final form. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

**Note:**  
Key Performance Measures Cross References Column links major programs to the charts/graphs in the Key Performance Measurement Processes Section of the Restructuring Report.  
Legal Standards Cross References Column links major programs to the statutes, regulations and provisions they satisfy which are listed in the Laws Section of the Restructuring Report.

Agency Submitting Report	Program/Title	Purpose	FY 2012-13 Expenditures			FY 2013-14 Expenditures			Key Performance Measures Cross References	Legal Standards Cross References
			General	Other	Federal	TOTAL	General	Other	Federal	TOTAL
Patricia P. Development Authority	Naval & Maritime Museum	To operate a National Naval & Maritime Museum		9,201,350		9,201,350		9,598,635		15,598,635

Remainder of Programs: List any programs not included above and show the remainder of expenditures by source of funds.

Remainder of Expenditures:	% of Total Budget	% of Total Budget	% of Total Budget	% of Total Budget	% of Total Budget	% of Total Budget
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**INSTRUCTIONS:** List all state and federal statutes, regulations and provisions that apply to the agency ("Laws") and a summary of the statutory requirement and/or authority granted in the particular Law listed. Included below is an example, with a partial list of Laws which apply to the Department of Juvenile Justice and Department of Transportation. The agency will see that a statute should be listed again on a separate line for each year there was an amendment to it. Please delete the example information before submitting this chart in final form. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

[illegible]

Agency Reporting Requirements Chart

**INSTRUCTIONS:** List all reports, if any, the agency is required to submit to a legislative entity. Beside each include the following under the appropriate column: a) Name of the report; b) Legislative entity that requires the report; c) Law(s) that require the agency to provide the report; d) Started legislative intent from legislative entity, statute, regulation or other source) in providing the report; e) Frequency with which the report is required (i.e. annually, monthly, etc.); f) Approximate year the agency first started providing the report; g) Approximate cost to compile the report and any positive results from compiling and submitting the report; and h) Method by which the agency receives, completes and submits the report (i.e. receive via emailed word document, log into or open program, enter data and click submit, etc.). Included below are examples of reports the agency may have to submit. The example does not include information in the columns under # of staff needed to complete the report, approx. total amount of time to complete the report and approx. total cost to complete the report, however the agency must complete these columns when submitting this chart in final form. Please delete the example figures before submitting this chart in final form. Please list all that are applicable.

Agency Submitting Report	Item #	Report Name	Legislative Entity Requesting Report	Law Requiring Report	Stated Intent of Report	Year First Required to Complete Report	Reporting Freq.	# of Days in which to Complete Report	Month Report Template is Received by Agency	Month Agency is Required to Submit the Report	# of Staff Needed to Complete Report	Approx. Total Amount of Time to Complete Report (considering staff time, etc.)	Positive Results of Reporting	Method in which Report Template is Sent to Agency (i.e. email, etc.)	Format in which Report Template is Sent to Agency	Method in which Agency Submits Report (i.e. email, etc.)	Format in which Agency Submits Report (i.e. email, etc.)
Patriots Point Development Authority	1	Reimbursing Report	House Legislative Oversight Committee	1-30-10(G)(1)	Increased Efficiency	2015	Annually	30	February	March			TBD	Email and Hardcopy	Word and Excel	Email and Hardcopy	Word and Excel
Patriots Point Development Authority	2	Accountability Report	Executive Budget Office														
Patriots Point Development Authority	3	Annual Financial Audit	State Auditor/Comptroller General Gov. Budget Office		Agency Accountability	1976	Annually	90	N/A	September	N/A	\$19,000		Email/Hard Copy	Word	N/A	N/A
Patriots Point Development Authority	4	Annual Budget			Agency FY Budget	1976	Annually	30	August	September	2	5 Days	Approved Budget	Email/Hard Copy	Word	Email and Hardcopy	Word
Patriots Point Development Authority	5	CPP	State Engineer		Agency Capital Projects		Annually	30	February	March	1	5 Days	Approved Capital Projects	Email/Hard Copy	Word	Email and Hardcopy	Word



**INSTRUCTIONS:** Identify the agency's internal audit system and policies during the past five fiscal years including the date the agency first started performing audits; individuals responsible for hiring the internal auditors; individuals to whom internal auditors report; the head internal auditor; general subject matters audited; the individual or body that makes decision of when internal audits are conducted; information considered when determining whether to conduct an internal audit; total number of audits performed in the last five fiscal years; # of months it took for shortest audit; # of months for longest audit; average number of months to complete an internal audit; and date of the most recent Peer Review of Self-Assessment by BC State Internal Auditors Association or other entity (if other entity name of that entity)

**Note:** All audits are not the result of suspicious activity or alleged improper actions. Often times regular audits are required by statute/regulation or an agency's standard operating procedure simply as a method of ensuring operations are staying on track.

Agency Submitting Report	Does agency have internal auditors? Y/N	Date Internal Audit began	Individuals responsible for hiring internal auditors	Individuals to whom internal auditors report	Name and contact information for head internal auditor	General subject matters audited	Who makes decision of when an internal audit is conducted	Information considered when determining whether to conduct an internal audit	Do internal auditors conduct an agency wide risk assessment routinely? Y/N	Total Number of Audits performed in last five fiscal years	# of months for shortest audit	# of months for longest audit	# of months for longest audit needed to conduct audit	Date of most recent Peer Review of Self-Assessment by BC State Internal Auditors Association or other entity (if other entity name of that entity)
Palatka Front Development Authority	No - Agency is audited annually by an independent CPA firm	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

## Personnel Involved Chart

**INSTRUCTIONS:** List the name of all personnel at the agency who were consulted or performed work to obtain the information utilized when answering the questions in these reports, their title and their specific role in answering the question (i.e. searched the agency documents, asked for information because they are in charge of the department, etc.) Please delete the example information and instructions row before submitting this chart in final form. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Name	Phone	Email	Department/Division	Title	Question	Role in Answering Question
Patriots Point Development Authority	R. Mac Burdette	843-881-5920	<a href="mailto:RMacBurdette@PatriotsPoint.org">RMacBurdette@PatriotsPoint.org</a>	Executive Office	Executive Director	Restructuring Report	Provided the responses
Patriots Point Development Authority	Royce Breland	943-881-5967	<a href="mailto:RBreland@PatriotsPoint.org">RBreland@PatriotsPoint.org</a>	Admin. Services	Dr. Admin. Serv.	Restructuring Report	Provided the responses
Patriots Point Development Authority	Bob Howard	843-881-5978	<a href="mailto:RHoward@PatriotsPoint.org">RHoward@PatriotsPoint.org</a>	Operations	Director of Operations	Restructuring Report	Provided the responses
Patriots Point Development Authority	Robert Clark	843-881-5997	<a href="mailto:RClark@PatriotsPoint.org">RClark@PatriotsPoint.org</a>	Information Technology	Communications Director	Restructuring Report	Provided the responses
Patriots Point Development Authority	Sylvia Wasden	843-881-5969	<a href="mailto:Swasden@PatriotsPoint.org">Swasden@PatriotsPoint.org</a>	Human Resources	Personnel Director	Restructuring Report	Provided the responses
Patriots Point Development Authority	Carol McLemore	843-881-922	<a href="mailto:CMcLemore@PatriotsPoint.org">CMcLemore@PatriotsPoint.org</a>	Executive Office	Administrative Assistant	Restructuring Report	Provided the responses