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**Jersey Heritage Trust
High level review of operational
performance**

**Economic Development Department
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1. Introduction

1.1 The Study Brief

In November 2009 Locum Consulting was appointed by the Department for Economic Development (EDD) of the States of Jersey to carry out a high level review of the operational performance of Jersey Heritage Trust (JHT or the Trust). Our brief was to work in tandem with BDO who were appointed by the States of Jersey to examine the financial position of the Trust.

A key overarching requirement of the brief was that the Locum team would work closely with the Trust, BDO and other stakeholders during the study process to help identify financially sustainable options for the way forward. One of these options would have to include the Trust operating within the current level of grant funding available from the States.

1.2 Our Approach to the Study

The Locum team has worked closely with the Trust, BDO Alto Limited (BDO), the Department for Economic Development (EDD) and the Department for Education, Sports and Culture (ESC) of the States throughout the study.

The work that has been carried out to inform this report includes:

- A review of a significant amount of relevant background material and reports;
- Face to face consultations with key stakeholders;
- Study visits to all of the key sites under the operation of the Trust;
- Review of the financial operation of the Trust (informed by the work carried out by BDO);
- Consideration of the performance of comparable organisations in the UK where possible and relevant to help inform our findings;
- Consideration of potential options for the Trust, in partnership with the key stakeholders, to deliver a long term sustainable future for the Trust.

It was required that Locum Consulting came to an early view on the overarching operational performance of the Trust and, in particular, a view on income generation performance and potential.

A summary paper of our findings and conclusions was presented in December 2009 with feedback received from all stakeholders. This report provides more detail to support our conclusions and recommendations, which have not fundamentally changed since the preparation of the summary paper.



1.3 Limitations

The Locum work has involved only a high level review of the market and operational performance of the Jersey Heritage Trust (JHT). We were not commissioned to carry out detailed research and analysis but rather use the information we have gleaned from our site visits, consultations, analysis of information provided by the Trust and our professional experience of comparable organisations throughout the UK to highlight issues, make observations and provide recommendations for moving forward. Indeed, each JHT site and service line would require its own detailed feasibility review so that specific recommendations could be tested prior to implementation. Our recommendations therefore need further scrutiny and additional work before moving forward.

References to the work of BDO Alto Limited ('BDO') relate to working papers or draft documents prepared by BDO under their own separate engagement terms to report to the Minister of Education, Sport and Culture as to the financial activities and governance arrangements in place in Jersey Heritage Trust, and provided to us to assist us in our review. Their work has been undertaken solely with their own engagement scope in mind, and for the sole use of the ESC Minister and his executive team. The work of BDO is based on the latest information made available to them and we accept no responsibility for their work or for events since the date that their work was completed. BDO has not been instructed to carry out any audit or other verification work on the financial information included in our report and they express no opinion thereon. Both BDO and ourselves present and comment on the projected results of Jersey Heritage Trust, which are solely the responsibility of the Trust. Since projected results relate to the future, actual results are likely to be different from those projected, because events and circumstances frequently do not occur as expected. The differences may be material.

1.4 Acknowledgements

We are grateful for the time and advice provided by all the people that we consulted during this process and, in particular,

- Clive Jones, Jon Carter, and Nick Danby of JHT
- Chris Swinson, Comptroller & Auditor General
- Samantha Jones and Matthew Corbin of BDO
- Rod McLoughlin and Mario Lundy of ESC
- Kevin Lemasney and Mike King of EDD

1.5 Structure of this Report

This report is structured with the following sections:

Section 2 - Summary of Conclusions



Section 3 - Background

Section 4 - The Current Performance of JHT

Section 5 - Options for Consideration

Supporting Appendices



2. Summary of Conclusions

2.1 Market Performance Findings

- The market in which JHT's public facing services operates (residents and tourists) is small by any standards and quite limited in terms of potential growth.
- JHT attractions actually perform very well in terms of its penetration of available markets:
 - c. 53,000 admissions from an available resident population of c. 92,000
 - c. 100,000 admissions from an available UK leisure tourist market of c. 380,000
 - c. 27,000 admissions from an available non UK overseas leisure tourist market of c. 160,000
- There is evidence of displacement and cannibalisation in the Jersey attractions market. We consider that Jersey is over-supplied with formal attractions given the size of the available markets.
- There is evidence to suggest that populist events (e.g. Hamptonne cider festival and Mont Orgueil Halloween event) are the most successful way of attracting additional and repeat visits to the sites, particularly from the resident market. There is also some evidence to suggest that temporary exhibitions, such as the Marilyn Exhibition, are also successful in attracting smaller levels of additional and repeat visits from the important resident market (c. 2,000 more resident visits to the Museum this year than last).

2.2 Operational Performance Findings

- It is important to separate out the day-to-day operational performance of the Trust in terms of running its business, from the governance and financial control responsibilities which we know have been criticised. We have concentrated on considering the performance of the day-to-day management and in particular on whether there are opportunities to generate substantial additional income.
- The Trust earned c. £1m of admissions income in 2008 from c. 145,000 paying visitors (c. 35,000 free admissions also achieved). This is an admissions income per head of c. £6.90. The average admission spend per head per paying visitor at the Association of Leading Visitor Attractions (ALVA) museums in 2007 was £5.72 and at ALVA heritage sites was £6.80.¹ Given the size and nature of JHT's attractions this is a very good performance. We would, however, suggest that the current level of free admissions to

¹ ERA presentation of ALVA findings for National Visitor Attractions Conference, October 2007



the JHT attractions is reviewed as there would appear to be the potential to generate relatively significant levels of additional admissions income. For example, if 50% of current free visits to the site became paid visits, the Trusts would gain an additional c. £120,000 of income (however the ability to achieve this potential additional income depends on the future strategy of the Trust).

- The financial information presently available to us does not include visitor spending on retail and catering at the various sites. However:
 - The overall £334,000 net trading income reported in the financial statements for 2008 appears reasonable in the light of the scope and size of the Trust's activities.
 - The most recent information from BDO reports £16,043 "retail outlets concession income" in 2008. For outlets on the scales involved we would expect the concession income to be in the region of 8% to 15% of turnover (although if paid on a rental basis there would be no direct link with turnover. Grossing up the £16,043 accordingly implies turnover (visitor spending) of £100,000 to £200,000 or a spend per head of £0.60 to £1.10. As it stands, this suggests an average spend that is low by ALVA standards and below average by the standards of comparable heritage attractions. We understand that JHT has carried out very recent reviews of its retail and catering operations and will be implementing changes and improvements in 2010. This is a positive step, particularly in trying to improve the quality of the offer to visitors, but the level of additional income that could be generated is, we believe, relatively limited.
- There may be potential to build the resident and, in particular, corporate membership scheme to generate additional income (but it is important to note that there may be impacts on the membership income of other heritage bodies on the island).
- With some investment in staff, there would appear to be potential to build events and functions (weddings, receptions, meetings, etc.) related income.
- We have not reviewed the operational costs of the JHT in any level of detail. This has been carried out by BDO. However, from simply our review of staffing levels at the various sites, we do not believe that the attractions themselves are currently over-staffed.

2.3 Conclusions and Recommendations

- 1 JHT attractions are performing relatively well in terms of attracting visits from the limited available market segments.
- 2 Overall the JHT is performing relatively well in terms of generating income from the operation of its attractions. The potential for increased catering and retail spend is quite limited. The following opportunities should, however, be considered further:



- Review the current level of free admissions offered to the JHT attraction sites;
 - Prepare and implement a strong corporate membership and corporate support action plan (recognising the potential impact on the membership schemes of other heritage bodies);
 - Examine in detail the potential to generate additional income from events and private functions at key sites. A number of the attractions provide wonderful stages and settings for events, meetings, receptions, weddings and other functions and JHT should work much closer with existing event organisers and operators to maximise the potential of its sites;
 - Examine the potential to generate additional property-let income at Elizabeth Castle in particular.
- 3 A target of achieving additional annual net income of c. £50,000 to a maximum of £100,000 (after additional direct costs) could reasonably be set given a combination of the above actions. This target, of course, might only be achieved if the Trust were to continue to operate all of its current attractions (refer to options later in this report).
 - 4 This level of potential additional income will not, unfortunately, be sufficient to plug the current annual operational shortfall which is estimated, in discussion with BDO, to be in the region of £555,000. This amount EXCLUDES the consideration of the need for a sinking fund for long term maintenance works and future investment in the all of JHT's current site's which we estimate to be in the region of an additional £465,000 per annum.
 - 5 It is therefore essential that a series of options for the long term future of the Trust must be considered. A number of preliminary options have been discussed with key stakeholders and are presented at the end of this report as a basis for future discussion. The options chosen are indicative of the extent of funding required to achieve sustainability under the status quo to, at the other extreme, the extent of service reduction required to operate on the current grant.
 - 6 A very general point worth considering when contemplating future strategy options for the Trust is with regards to the Trust's role as a heritage conservation organisation first, and an attractions management organisation second. Could the Trust deliver greater heritage value by providing preservation and interpretation for the island as a whole, as opposed to operating specific 'attraction' sites? This is a policy decision that needs to be taken by the key stakeholders involved.
 - 7 The findings of this report, together with those of BDO, and the potential options presented in the last section of this report, need to be considered by the Department of Education, Sports and Culture. No doubt there could be other options that the Department would wish JHT to consider and analyse. Ultimately the States will need to consider the implications of this review and the options presented and make a decision on the level of services that it wishes to support. Further feasibility study will be required before any options can be implemented.



3. Background

3.1 The JHT

The JHT was established in 1981 as a not-for-profit heritage organisation. Statements on the organisation's web-site explains that:

Jersey Heritage protects and promotes the Island's rich heritage and cultural environment. We aim to inspire people to nurture their heritage in order to safeguard it for the benefit and enjoyment of everyone.

In Jersey we are responsible for the island's major historic sites, award-winning museums and public archives. We hold collections of artefacts, works of art, documents, specimens and information relating to Jersey's history, culture and environment. These collections define the island, hold the evidence for its historical development and act as the community's memory.

Full details of the Trusts principal activities can be found on their website www.jerseyheritage.org and are summarised in Appendix 1.

It has been pointed out to the Locum team that the Trust is first and foremost a heritage conservation organisation rather than an attractions management organisation. This is an important point of clarification as it demonstrates a prioritisation of activity for the Trust. Heritage does not have to be preserved and promoted within the confines of a formal attraction. The heritage offer of the Island is not a number of attractions but the island itself - its sites and landscapes - the majority of which do not have to be manned or controlled. An interesting discussion could be had regarding the future strategy of the Trust if consideration is given to its role as providing preservation and interpretation for the island as a whole, as opposed to operating specific 'attraction' sites. This is a key policy decision that requires the input of all stakeholders.

3.2 What Has Gone Before

JHT has got into significant financial difficulty in recent years as a result of a number of factors that are well known to the key stakeholders involved. A review of the financial condition, governance arrangements and financial management of the Trust was carried out by the Comptroller & Auditor General in late 2009 and it is not necessary to go over the findings of that report here. However, there are a few overarching points that are worth noting here as they pertain to this study:

- At the core of JHT's current predicament is the issue of 'Aspiration vs Affordability'. As the island's key heritage organisation, the Trust has taken on more and more sites, facilities and activities over the years without fully considering the long term financial implications nor receiving commitments of additional financial support.



- The economic climate within which the Trust operates today, both in terms of the island’s tourism market but also in terms of the potential to secure additional revenue support from the States, has changed significantly in the last 5 to 10 years.
- We understand that some people on the island hold the view that a heritage organisation such as the Trust should be able to cover its operational costs from the income that it generates by operating heritage attractions and sites. It is important that we state clearly that almost every single heritage organisation or museum service in the UK that Locum consultants have worked with over the past 30 years does not generate enough income from its core visitor operations to cover its operating costs.

3.3 The Current Financial Position and ‘Gap’

BDO has carried out a detailed review of the current financial position of the Trust. BDO and the Trust have identified that the current annualised level of trading deficit is c. £555,000 (this figure is likely to change as BDO continue their work with the Trust). In other words, if the Trust is to continue to provide its current level of services, it would make an annual loss of c. £555,000 (at 2010 prices) given its current admissions, income and costs profile.

It is important to point out that although this includes the provision for the day to day maintenance of its key sites, it EXCLUDES the provision for future maintenance liabilities and capital investment in sites. Following discussion amongst the key stakeholders and consultants, it has been estimated that a further annual budget of c. £465,000 would need to be set aside to cover these exclusions as follows:

• Sinking funds for future site investments:	
• <i>Maritime Museum</i>	<i>£100,000</i>
• <i>Hamptonne</i>	<i>£0</i>
• <i>Elizabeth Castle</i>	<i>£100,000</i>
• <i>Mont Orgueil</i>	<i>£100,000</i>
• <i>Jersey Museum</i>	<i>£100,000</i>
• <i>La Hougue Bie</i>	<i>£20,000</i>
• Sinking funds for future maintenance liabilities:	
• <i>La Hougue Bie</i>	<i>£20,000</i>
• <i>Archive</i>	<i>£25,000</i>
Total Annualised Sinking Fund Requirement	<i>£465,000</i>

This financial situation is therefore very severe and drastic action will need to be taken to return the Trust to a long term sustainable business model.



3.4 The Market in which JHT Operates

3.4.1 Size of the Market

The potential for JHT's visitor attractions is constrained by the size of the market, i.e. the resident population and visitors to the Island.

The resident population is currently about 92,000 with about 16,000 of the island's population aged under 16. The resident population is obviously a key market for the Trust's activities given their local interest and potential for repeat visits.

The official Jersey Tourism visitor estimates for 2008 show 729,700 visits which can be categorised as shown in Exhibit 1.

Exhibit 1: Visits to Jersey, 2008

Total tourism visitor volume	729,700	Numbers have been in long term decline from the 1980s. They stabilised at about 750,000 in 2003 to 2005 but have declined very slightly since.
Staying visitors	554,100	
Staying leisure visitors	454,700	Paid accommodation or staying with friends and relatives
Paid accommodation	370,700	
Staying with friends & relatives	84,100	
Visiting yachtsmen	19,900	
Staying business visitors	67,310	The number of staying business visitors declined between 2007 and 2008 but was counterbalanced by an increase in day visits and average stay.
Conference delegates	9,200	
Language students	2,850	
Day visits	127,900	
Leisure day trip visits	89,700	FR 44,700, UK: 17,000, CI 9,330; other 18,700.
Business day visits	38,220	

People visiting the island for the purpose of holiday are likely to be the second core market for the Trust, not just because there are so many of them in relation to the size of the local population, but because people who are on holiday have a high propensity to visit attractions. The 454,700 staying leisure visitors in 2008 were made up as follows:

Exhibit 2: Staying leisure visitors by origin, 2008

	<i>Paid</i>	<i>SFR</i>	<i>All</i>
UK	289,400	66,800	356,200
France	32,800	3,600	36,400
Other	48,500	13,700	62,200
Total	370,700	84,100	454,700



Visitors to Jersey tend to be in higher socio-economic categories. Almost a half of UK staying visitors in 2006 were in the affluent ACORN categories A (Wealthy Executives, Affluent Greys, Flourishing Families) and B (Prosperous Professionals, Educated Urbanites, Aspiring Singles) compared to 30% of the population as a whole². Similarly, MOSAIC profiling of UK visitors to Jersey in 2008 demonstrated a higher proportion of more affluent visitors³.

Jersey has worked hard to halt the decline of tourism to the Island but given ever increasing competition from both established and emerging short break and long stay destinations, it is difficult to foresee any major growth in tourism to the island in future. As a result, the future strategy for the Trust should be founded upon the assumption that tourism to the island is not likely to increase, and for prudence, should consider the potential for a further decrease in tourism volume.

3.4.2 Competition from Other Attractions

In addition to the key attractions operated by the Trust, Jersey has two other very major attractions in Durrell and the War Tunnels, and a good supply of smaller attractions - museums and galleries, gardens, and heritage sites. The following list of attractions was used in the 2008 Jersey Visitor Survey when leisure visitors were asked which attractions they had visited on the island.

Exhibit 3 : Visits to Jersey Attractions by Leisure Visitors

Attraction	% visiting	Attraction	% visiting
Jersey War Tunnels	45.53	Catherine Best Jewellery	11.38
Jersey Pearl	44.63	Samarès Manor	11.22
Jersey Pottery	40.73	Maritime Museum	11.04
Durrell Wildlife	38.58	Bouchet Agateway Pottery	7.86
Jersey Goldsmiths (Lion Pk)	33.35	Eric Young Orchid Foundation	5.85
Mont Orgueil (Gorey) Castle	24.49	La Hougue Bie Museum	5.77
Living Legend	23.96	Sand Wizard in St. Ouen	5.70
CI Military Museum	21.60	Pallot Steam & Motor Museum	5.41
Elizabeth Castle	19.07	Hamptonne	5.26
Jersey Museum in St. Helier	17.52	Battle of Flowers Museum	4.75
Jersey Lavender Farm	13.99	Treasures of the Earth	4.64
The Shell Garden	15.02	aMaizin! Maze	3.95
La Mare Wine Estate	11.53	Aqua Splash Leisure Pool	3.63

² Jersey Tourism Annual Report, 2006.

³ Jersey Tourism Annual Report, 2008



Source: 2008 Jersey Visitor Survey

All in all the stock of attractions is large in comparison to the size of the resident and visitor markets and it seems likely, from our experience, that the market is saturated. Indeed a study by Opinion Leader Research for JHT suggests this too.

As a very high level comparison, Jersey would appear to have more visitor attractions than the extremely popular tourist city of Brighton which has a population of c. 300,000 and a tourist market (day and stay visitors) of c. 8m.



4. The Current Performance of JHT

4.1 Introduction

It is important to separate out the day-to-day operational performance of the Trust in terms of running its business, from the governance and financial control responsibilities which we know have been criticised. We have concentrated on considering the performance of the day-to-day management and in particular on whether there are opportunities to generate substantial additional income.

4.2 Visitor Admissions Performance

Exhibit 4 below shows the number of visits to the JHT attractions in 2009, broken down by the origin of the visitors. The bars show the total number of visits to each attraction, with coloured segments to distinguish between local, UK visitors, or other visitors. The numbers in the bars show the percentages from each origin at each attraction (rounding errors mean they do not all add up to 100).

The legend at the bottom of the table also gives the totals and overall percentages from each origin.

Exhibit 4: Visits to JHT attractions by origin, 2009

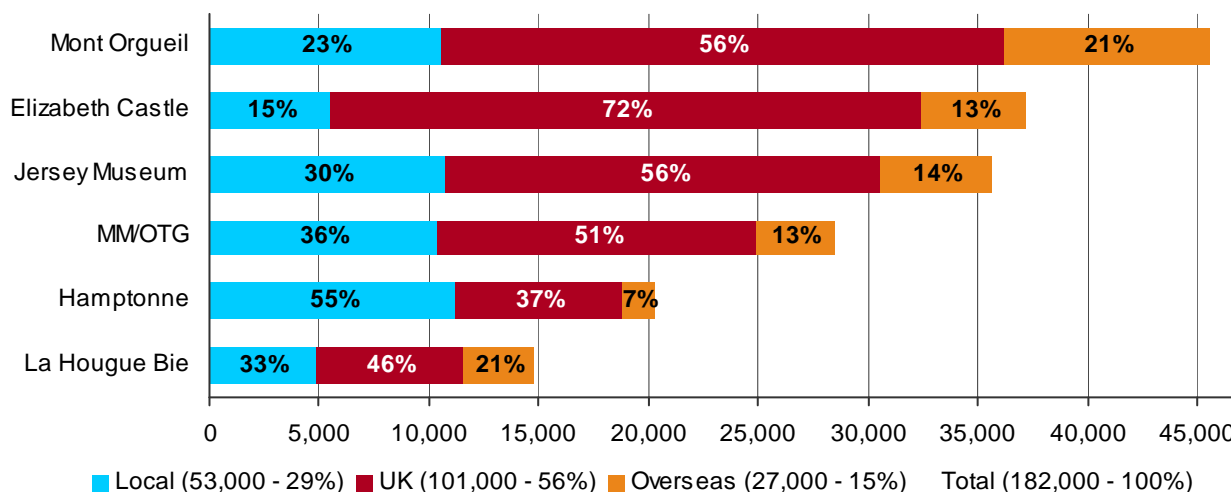


Exhibit 4 is worth examining in some detail. The following comments are based on the 2009 figures, but the picture in 2008 was mostly similar.

- The blue bars show that four attractions (Mont Orgueil, the Museum, MM/OTG and Hamptonne) received more than 10,000 visits from locals despite attracting very



different numbers of non-local visitors. The Museum managed to achieve this level in 2009 because of the Marilyn exhibition (in 2008 it attracted 8,300 local visits);

- Elizabeth Castle was far the worst performer at attracting local visits. It got hardly more locals than La Hougue Bie despite attracting three times the total number of visits. In 2008 the castle did even worse, with only 11% of visits from locals.
- Hamptonne is the only one to attract fewer visits from non-locals than from locals - and a tiny proportion from overseas. This is not surprising given its subject matter and comparatively awkward location (for non residents to find) - and the existence of many similar farming/folk attractions in other countries. The high proportion of local visitors - many of whom do not have to pay the admission charge - is one reason for the financial position.
- La Hougue Bie has a small visitor base but attracts the highest proportion of overseas visitors (along with Mont Orgueil). This can be attributed to its importance and rarity as an archaeological site.

More generally, there is evidence from our analysis to suggest that delivering populist events (e.g. Hamptonne cider festival and Mont Orgueil Halloween event) is one of the most successful ways of attracting additional and repeat visits to the sites, particularly from the resident market. There is also some evidence to suggest that temporary exhibitions, such as the Marilyn Exhibition, are also successful in attracting smaller levels of additional and repeat visits from the important resident market (c. 2,000 more resident visits to the Museum this year than last).

Based on this analysis of JHT attractions it is reasonable to conclude that the JHT attractions actually perform very well in terms of penetration of available markets:

- c. 53,000 admissions from an available resident population of c. 92,000
- c. 100,000 admissions from an available UK leisure tourist market (day and stay visitors) of c. 380,000
- c. 27,000 admissions from an available overseas leisure tourist market of c. 170,000

This level of penetration of the resident and UK leisure market is very high in our experience and it therefore leads us to conclude that there should not be an expectation that the Trust could attract significantly more visits to its key attraction sites.

4.3 Income Generation

Admissions Income

The Trust has worked hard to grow admissions income to its key attractions over the past 5 years.



Exhibit 5 : Admissions Income at Key Attractions

	2006	2007	2008	9M 2009
Jersey Museum	£96,388	£116,775	£116,902	£149,200
Maritime Museum	£131,660	£148,487	£121,789	£109,873
Elizabeth Castle	£171,690	£122,399	£280,166	£274,630
Mont Orgueil	£304,047	£332,227	£334,669	£296,654
La Hougue Bie	£52,361	£60,263	£81,867	£58,402
Hamptonne	£67,116	£59,918	£61,708	£50,160
Total Admissions Income	£825,268	£842,076	£999,109	£938,919

Source: BDO analysis of accounts, January 2010. Note: 2009 figures are for 9 months only

As can be seen in Exhibit 5 above, the Trust earned c. £1m of admissions income in 2008 from c. 145,000 paying visitors (c. 35,000 free admissions also achieved).

This is equivalent to an admissions income per head of c. £6.90. The average admission spend per head per paying visitor at the Association of Leading Visitor Attractions (ALVA) museums in 2007 was £5.72 and at ALVA heritage sites was £6.80.⁴

Given the size and nature of JHT's attractions this is a very good performance.

We would, however, suggest that the current level of free admissions to the JHT attractions is reviewed as there would appear to be the potential to generate relatively significant levels of additional admissions income. For example, if 50% of current free visits to the site became paid visits, the Trusts would gain an additional c. £120,000 of income. However, it is important to note a number of key points:

- 1 Visitors that currently receive free admission to the Trust sites would not necessarily visit if they had to pay
- 2 Policy decisions will need to be taken with regards to the appropriateness of charging for schools and under 6 visitors
- 3 The ability to achieve potential additional admissions income depends on the future strategy of the Trust e.g. if a number of attractions are closed, the Trust cannot be expected to increase admission income.

Retail and Catering

The financial information presently available to us does not include visitor spending on retail and catering at the various sites for comparison with other heritage attractions in the UK.

However, a very recent external review of catering opportunities for the Trust has been completed and does not identify any significant opportunities for increased revenues⁵. Indeed, in terms of Elizabeth castle, the report concludes that there is currently little

⁴ ERA presentation of ALVA findings for National Visitor Attractions Conference, October 2007

⁵ Option Appraisal on Catering for Jersey Heritage, Food Service Associates, January 2010.



opportunity to make the catering commercially attractive with the current offer and visitor numbers even if the facilities and ambience were improved.

In terms of retail, the most recent information from BDO reports £16,043 “retail outlets concession income” in 2008. For outlets on the scales involved we would expect the concession income to be in the region of 8% to 15% of turnover (although if paid on a rental basis there would be no direct link with turnover). Grossing up the £16,043 accordingly implies turnover (visitor spending) of £100,000 to £200,000 or a spend per head of £0.60 to £1.10. As it stands, this suggests an average spend that is low by ALVA standards and below average by the standards of comparable heritage attractions. We understand that JHT has carried out a recent review of its retail operations and will be implementing changes and improvements in 2010. This is a positive step, particularly in trying to improve the quality of the offer to visitors, but the level of additional income that could be generated is, we believe, relatively limited.

Membership Schemes

The Trust has managed a Business Membership programme for a number of years that generates approximately £35,000 to £40,000 of income per annum. A public membership programme was launched in 2008 and has been successful in generating additional income of over £50,000 in 2008 and £65,000 in the first nine months of 2009.

Exhibit 6 : Membership Income

	FY 2006A	FY 2007A	FY 2008A	9M 2009A
Public Memberships	-	-	£51,713	£65,241
Business Memberships	£31,250	£27,350	£38,450	£34,000

Source: BDO analysis of accounts, January 2010. Note: 2009 figures are for 9 months only

In 2004, the National Audit Office published a report⁶ on the income generated by the 17 museums and galleries receiving DCMS grant-in-aid (i.e. the “national” museums and galleries). Based on an analysis of financial returns for 2002-03, the report concluded that public membership income accounted for 3% of all self-generated income (JHT is achieving a similar level from its public membership scheme) and that the museums and galleries were increasingly looking to raise additional income through such schemes, despite relatively low returns due to the costs of providing services to members. The museums and galleries perceived long term benefits from membership schemes through building relationships with supporters.

The Wallace Collection, an internationally renowned central London institution, has a highly successful premium corporate membership scheme tied to concessions on venue

⁶ Income Generated by the Museums and Galleries; NAO; January 2004



hire. Cost of corporate membership ranges from £7,500 per annum to £17,000 per annum depending upon the level of membership purchased.

Although the JHT does not have the profile of the Wallace Collection nor the scale of the London market, we still believe that there may be potential to grow corporate membership schemes to generate additional income. However, it is important to note that there may be impacts on the membership income of other heritage bodies on the island. This is not something that we have examined but it was referred to in the report of the Comptroller & Auditor General.

One further opportunity that could be worth consideration in the future is the potential role that the Trust could play in helping businesses in Jersey deliver on their Corporate and Social Responsibility (CSR) targets. CSR is becoming a very important issue for large, multi-national companies in particular, and these companies are looking for innovative and inspiring ways to address their responsibilities and motivate their staff. Perhaps the Trust could offer training, education and volunteer work programmes for the staff of key businesses on the island to help promote the Trusts activities and generate additional income?

Functions and Events

It has not been possible to identify specifically the income that has been generated by events and functions. Many of the events at the attractions have served to increase admissions and so the income is included within overall admission, retail and catering figures.

It is therefore necessary to be cautious in providing any formal recommendations in the absence of more detailed analysis and feasibility work. Indeed, we have heard that there is a general view that there may be too many public events on the island? Whilst we are not in a position to uphold or refute that view, our experience tells us that if an event is of high quality and popular appeal, then people are willing to make additional visits to these events i.e. it is possible to grow the market.

What is very evident is that when the Trust does run popular events such as the Hamptonne cider festival and Mont Orgueil Halloween event, they have been very successful at attracting additional visits and income.

There is no doubt that a number of the Trust's attractions provide wonderful stages and settings for events, meetings, receptions, weddings and other functions. With some investment in staff and by working much closer with existing event organisers and operators on the island, we believe that there is potential to grow events and functions (weddings, receptions, meetings, etc.) related income.



Property Lets

The innovative Forts and Towers scheme has proved to be very successful and has contributed a positive net income to the Trust for the past 4 years.

Exhibit 7 : Forts & Towers net contribution

	FY 2006A	FY 2007A	FY 2008A	9M 2009A
Forts and Towers	£29,565	£96,634	£124,440	£143,283

Source: BDO analysis of accounts, January 2010. Note: 2009 figures are for 9 months only

The 'Heritage Let' at Elizabeth Castle has also provided a positive income of c. £13,000 each year for the Trust. The castle in particular has the potential to offer a significant number of additional 'Heritage Let' opportunities and we believe this should be considered further in a specific feasibility study.

4.4 Cost Control

We have not reviewed the operational costs of the JHT in any level of detail. This has been carried out by BDO. However, we would wish to make two general points:

- from our review of staffing levels at the various sites, we do not believe that the attractions themselves are currently over-staffed;
- the marketing spend of the Trust (which can be a key driver of visits and income) is currently within benchmark levels of c. 10% to 14% of admission income or £0.50 to £1.00 per visitor.

4.5 High Level Site by Site Review

The JHT manages a total of 21 sites, of which 10 are open to the public (not necessarily all year round) and the remainder are the **Forts and Towers** used for short-stay holiday accommodation.⁷ It must not be forgotten, however, that the island has very many other sites and buildings of historic and heritage significance all of which are to some extent within JHT's overall heritage protection remit.

With the assistance of JHT staff we were able to visit all the "public" sites⁸ and several of the Forts and Towers. What follows is a brief discussion of the main sites.

⁷ See Appendix 1 for the list.

⁸ With the exception of the Fort Regent Signal Station.



4.5.1 Jersey Museum and Art Gallery (and 9 Pier Road)

The Offer / Service	<p>Local history museum and art gallery. Also includes restored historic interiors in 9 Pier Road, a wealthy Victorian merchant's house.</p> <p>History displays are old but mostly in good condition. Original interactives have mostly failed and been removed. Principal gallery space currently devoted to Marilyn Monroe exhibition.</p> <p>Facilities include JHT visitor information service and bookshop. Café/bistro in entrance courtyard gains much or most of its business from non-visitors thanks to high quality and good town centre location.</p>
No. of Users & Trends	<p>About 27,000 visits per annum in the period 2003 to 2008, down from c. 60,000 in the mid-'90s.</p> <p>The Marilyn exhibition helped to attract 36,000 visits in 2009 (40% more than in 2008).</p>
Price	<p>Adults - £7.00</p> <p>Seniors (65+) - £6.50</p> <p>Children (6-16)/Students - £4.20</p> <p>Children under 6 go free</p> <p>Family ticket (2+2 or 1+3) - £22</p>
Admission Income	<p>2006 - £96,000</p> <p>2007 - £117,000</p> <p>2008 - £117,000</p>
Other Income	<p>Sponsorship of exhibitions - variable e.g. £12,000 in 9 months of 2009 but only £2,600 in 2008</p> <p>Heritage venues - stable £25-£28,000 during 2006-08</p> <p>Rental of staff flat - c. £5-£8,000</p> <p>Brassiere rent - £21,000 in 2008</p>
Cost breakdown	<p>Expenditure profile in 2008: staff costs 54%, exhibition costs 16%, heat light and water (net of office costs) 14%, Site Team expenses 12%, Heritage venues direct costs 2%, cleaning and gardening 2%.</p> <p>Total expenditure c.£250,000</p> <p>Overall net operating cost to Trust c. -£80,000 in 2008</p>
Comments on performance	<p>JHT receives limited benefit from café/bistro because the space is let to the operator with a straightforward rent rather than a</p>



	turnover-related arrangement.
Potential for investment?	Investment planned to restore and open more rooms of 9 Pier Road (currently used as office and storage space). We are not convinced that this will help improve visitor or income performance.
Other opportunities?	The Marilyn Exhibition is a great example of an in-house produced temporary exhibition that has attracted additional visitors and income. The challenge is repeating this success without significant capital spend.

4.5.2 Maritime Museum

The Offer / Service	<p>Set in the historic harbour of St Helier, the Maritime Museum is a relatively new, purpose built interactive museum about seafaring, navigation and the elements, told through the stories of Jersey people.</p> <p>An attractive museum but with little to attract repeat business without regular investment in exhibit renewal.</p> <p>There is a small shop but no catering offer (there is a café next door).</p>
No. of Users & Trends	28,000 visits in 2008 and 2009
Price	<p>Adults - £7.50</p> <p>Seniors (65+)- £7.00</p> <p>Children (6-16) /Students - £4.50</p> <p>Children under 6 go free</p> <p>Family ticket (2+2 or 1+3) - £22</p>
Admission Income	<p>2006 - £132,000</p> <p>2007 - £148,000</p> <p>2008 - £122,000</p> <p>2009 - £110,000 (9 months only)</p>
Other Income	n/a
Cost breakdown	<p>Expenditure profile in 2008: Staff costs 54%, rent 28%, heat light and water 9%, Site Team expenses 6%, Other 3%.</p> <p>A lease of c. £70,000 per annum is paid to the Harbour Commissioners for use of the building.</p> <p>Total expenditure c. £250,000</p>



	Overall net operating cost to Trust c. -£131,000 in 2008
Comments on performance	Visitor numbers are likely to slowly decline without investment in exhibit renewal. There is currently little incentive for repeat visits.
Potential for investment?	The rental cost of the building is too high and may negate the case for future investment
Other opportunities?	Does the maritime story of Jersey need to be told in its own, costly building? Could the story be told at one of the Trust's other sites such as the museum or Elizabeth Castle for example?

4.5.3 Occupation Tapestry Gallery

At present the Occupation Tapestry Gallery is on the same site as the Maritime Museum and behind the same pay barrier, but it is conceptually quite different and its importance to the people of Jersey is of a different order, so it deserves separate consideration.

In particular, the Occupation Tapestry is unique but it is not tied to a particular site. In taking decisions about the future of the Maritime Museum, care must be taken to reassure the public that the future of the Occupation Tapestry itself is not threatened. We consider that a new Occupation Tapestry Gallery could be provided in the context of commercial property development in St Helier, creating a suitable, accessible space as part of the developer's contribution to the community.

Alternatively, it could site within another one of the Trust's sites.

4.5.4 Elizabeth Castle

The Offer / Service	A truly stunning 16th Century castle, accessible only by foot at low tide or by amphibious vehicles at all times (weather permitting). Relatively static museum displays in need of re-investment. The attraction closes for the winter.
No. of Users & Trends	37,000 visits in 2008, 36,000 in 2009
Price	2010 prices yet to be confirmed.
Admission Income	2006 - £172,000 2007 - £122,000 2008 - £280,000 2009 - £275,000 (9 months only)



<p>Other Income</p>	<p>Heritage Venues - down from £18,000 in 2006 to £8,000 in 2008</p> <p>Heritage Lets - £13,500 in 2008</p>
<p>Cost breakdown</p>	<p>Expenditure profile in 2008: Staff costs 41%, transport/vehicles 27%, transfer to AMF 13%, depreciation of vehicles 9%, retail investment 4%, other 6%</p> <p>Total expenditure c. £480,000</p> <p>Overall net operating cost to Trust c. -£176,000 in 2008</p>
<p>Comments on performance</p>	<p>Extremely limited by current access. Surprisingly very few resident visits to the site - although this may be due to lack of reasons to make repeat visits.</p>
<p>Potential for investment?</p>	<p>Access is a major issue and we would be cautious in recommending major investment (as an attraction) if this is not improved. If all year round pedestrian access to the castle by bridge or tunnel could be provided, it might be sensible to relocate all of the maritime museum and Jersey Museum collections to the castle and make the castle the flagship heritage attraction offer of the Trust and Island. A detailed feasibility study would be required (see also 2007 Locum report on Elizabeth Castle referred to below).</p>
<p>Other opportunities?</p>	<p>In 2007, JHT commissioned Locum Consulting to conduct an Options Appraisal for the future of Elizabeth Castle. This identified many possible uses for the Castle, most of them capable of being operated in harmony. These were presented in a "possible vision" for the future of the Castle.⁹</p> <p>Of all individual uses, self-catering accommodation was considered the most commercially viable and lowest-risk; it is also part of the overall vision. Developments since 2007 make commercial viability even more important. Other historic self-catering properties on the island have been successful.</p>

⁹ Elizabeth Castle Options Appraisal Report, section 4.



4.5.5 Mont Orgueil

The Offer / Service	<p>Another stunning Jersey castle, built earlier than Elizabeth Castle at the start of the 13th century. It offers a very appealing castle experience where it is possible to explore the network of staircases, towers and rooms and take in the magnificent views over the harbour of Gorey.</p> <p>A refurbishment of the castle has been proved to be successful and together with the introduction of a 'Living History' team of re-enactors, the castle is one of the most popular attractions on the Island for residents and visitors.</p> <p>A Halloween event attracted an estimated 3,000 visitors to the castle in a single evening.</p> <p>The castle opens for 4 days over winter.</p>
No. of Users & Trends	47,000 visits in 2008, 46,000 in 2009
Price	<p>Adults - £9.50</p> <p>Seniors (65+) - £8.50</p> <p>Children (6 to 16)/Students - £5.60</p> <p>Children under 6 go free</p> <p>Family ticket (2+2 or 1+3) - £27.00</p>
Admission Income	<p>2006 - £304,000</p> <p>2007 - £332,000</p> <p>2008 - £335,000</p> <p>2009 - £297,000 (9 months only)</p>
Other Income	Heritage Venues - up from £20,000 in 2006 to £45,000 in 2008
Cost breakdown	<p>Expenditure profile in 2008: Staff costs 48%, transfer to AMF 36%, cleaning and gardening 7%, other 9%</p> <p>Total expenditure c.£210,000</p> <p>Overall net contribution to Trust c. +£166,000 in 2008</p>
Comments on performance	The only visitor attraction that makes a positive operational contribution to the Trust BEFORE central costs. The 'Living History' re-enactors and the events programme give people a reason to visit on a number of occasions.
Potential for investment?	Further investment in events. Corporate functions opportunity
Other opportunities?	A Destination Restaurant with views of the castle and bay?



4.5.6 La Hougue Bie

<p>The Offer / Service</p>	<p>The attraction at La Hougue Bie consists of the following elements:</p> <ul style="list-style-type: none"> • A mound containing a fine and important Neolithic passage grave. • A reconstructed Neolithic dwelling used for educational visits, re-enactments etc. • A medieval chapel atop the mound. • A small, archaeological museum with two galleries and a screening room which presents in introductory video with commentary in English, French or German. Neither gallery is wheelchair-accessible. • A German command bunker that has been fitted out as a memorial to the slave labourers brought to Jersey during the Occupation. <p>In addition there is an archaeological workshop/conservation area and a building used for meetings. The site is open to visitors during the summer and is also used for events (e.g. market and fair at the Spring equinox, when the rising sun is aligned with the passage grave).</p> <p>All the elements are in keeping with the scale of the site and the visitor market.</p> <p>The attraction closes for the winter</p>
<p>No. of Users & Trends</p>	<p>20,000 visits in 2008, 15,000 in 2009</p>
<p>Price</p>	<p>2010 prices yet to be confirmed.</p>
<p>Admission Income</p>	<p>2006 - £52,000 2007 - £60,000 2008 - £82,000 2009 - £58,000 (9 months only)</p>
<p>Other Income</p>	<p>n/a</p>
<p>Cost breakdown</p>	<p>Expenditure profile in 2008: Staff costs 60%, site team 28%, heat light water 7%, security and cleaning 6%</p> <p>Total expenditure c. £120,000</p> <p>Overall net operating cost to Trust c. -£42,000 in 2008</p>



Comments on performance	Site is limited by its core offer in terms of the buildings and the site and the market in general.
Potential for investment?	Limited
Other opportunities?	Limited

4.5.7 Hamptonne Country Life Museum

The Offer / Service	<p>Located in the heart of the island (and difficult to find for visitors) Hamptonne is a collection of picturesque farm buildings and meadows from 17th century rural life. Visitors can explore the cluster of restored farmhouses and outbuildings or follow a nature trail and feed the farm animals. Discover local Jersey traditions such as cabbage loaves and cider making.</p> <p>A 'Living History' team of re-enactors are used to help tell the story of the key buildings and activities of the time.</p> <p>The attraction closes for the winter.</p>
No. of Users & Trends	21,000 visits in 2008, 20,000 in 2009
Price	2010 prices yet to be confirmed.
Admission Income	<p>2006 - £67,000</p> <p>2007 - £60,000</p> <p>2008 - £62,000</p> <p>2009 - £50,000 (9 months only)</p>
Other Income	Heritage Venues - £10,000 in 2008
Cost breakdown	<p>Expenditure profile in 2008: Staff costs 66%, site team 20%, heat light water 5%, cleaning and gardening 7%, other 1%</p> <p>Total expenditure c. £150,000</p> <p>Overall net operating cost to Trust c. -£74,000 in 2008</p>
Comments on performance	<p>Hamptonne is one of the most complex sites. It is of considerable heritage and architectural importance, but the cost of keeping it open greatly exceeds its income-generating capacities.</p> <p>The performance of the site is restricted by its location and, to some extent, by competition from other attractions.</p>



	Events such as the cider festival and the Living History re-enactors are key visitor draws.
Potential for investment?	Very limited because of the need to maintain the integrity of the buildings and its setting.
Other opportunities?	Only open the site for key events throughout the year that will be popular and generate positive income?

4.5.8 Sir Francis Cook Gallery

The gallery building provides useful office space and a large room (a former chapel) suitable for meetings and small exhibitions and performances. The terms under which JHT occupies the site require the permanent exhibition of a number of works by Sir Francis Cook (from among the thousands that he left). The first-floor gallery created by Cook is now used by the Trust as an art store housing some of the Cook works and many others from its collection that for one reason and another cannot be displayed.

Also on the site are two residential units, rental from which offsets the running costs of the gallery, and a modern purpose build museum store which provides very good storage conditions for the reserve collections as well as workshop and conservation space. Public access to the reserve collections is provided on open days and by appointment. The building would have to be modified to provide freer and wider access to the reserve collections.

As with almost all long-established museums the reserve collections contain many objects that if offered nowadays would probably not have been accepted and accessioned into the collection. De-accessioning (under the conditions laid down by the \Museum Registration Scheme) is neither slow nor simple, and radical slimming of the collection as a cost saving measure would be incompatible with the Museum's registered status.

4.6 Could JHT Generate More Income from its Activities?

Overall the JHT is performing relatively well in terms of generating income from the operation of its attractions. The potential for increased catering and retail spend is quite limited. The following opportunities should, however, be considered further:

- Review the current level of free admissions offered to the JHT attraction sites;
- Invest more resources to build a strong corporate membership and corporate support action plan (recognising the potential impact on the membership schemes of other heritage bodies);
- Examine in detail the potential to generate additional income from events and private functions at key sites;



- Examine the potential to generate additional property-let income at Elizabeth Castle in particular.

A target of achieving additional annual net income of c. £50,000 to a maximum of £100,000 (after additional direct costs) could reasonably be set given a combination of the above actions. This target, of course, might only be achieved if the Trust were to continue to operate all of its current attractions (refer to options later in this report).

Ultimately, as is evidenced by our site by site review above, the real challenge facing the Trust, if it is not to receive additional grant support, is a programme of major rationalisation and cost cutting.



5. Options for Consideration

5.1 Need for Clarity

In our opinion a major reason for the situation into which JHT has drifted or been allowed to drift is **lack of clarity** concerning (a) just what heritage functions the States have delegated to the Trust and (b) the extent to which the States take responsibility for paying for them. Responsibility for this situation does not rest exclusively with either the Trust or the States, although it is clear to us that the States have used the Trust as a way of avoiding having to make difficult heritage decisions and that the Trust has not always taken sufficient account of the consequences for itself of having to make such decisions.

5.2 Options / Scenarios

Working closely with BDO and Trust, the Locum team led a discussion on possible future operational options for the Trust in terms as a basis for future discussion. The options chosen are indicative of the extent of funding required to achieve sustainability under the status quo to, at the other extreme, the extent of service reduction required to operate on the current grant.

- Option 1 - Significantly reduced but sustainable JHT operation within existing level of States' grant funding
- Option 2 - Somewhat reduced but sustainable JHT operation with some additional States grant funding
- Option 3 - Current but sustainable JHT operation with significant additional States grant funding

In all options we have had to assume that there would be no further significant drop in the island's tourism performance specifically and economic performance more generally.

The proposed actions to be taken to implement these options and the resulting financial impact is summarised in the table overleaf.

Please note that the financial figures below are very high level estimates with inherent limitations as a result. Also, the following table summarises the potential long term financial impact of proposed options. A period of 1 to 2 years of transition would be required to implement either Option 1 or Option 2 below.



HIGH LEVEL - Options for Consideration (all figures are indicative and subject to detailed feasibility work)

Option 1 - JHT operating within existing grant level (BUT NO BUDGET FOR FUTURE LARGE INVESTMENT IN REMAINING SITES)		Option 2 - JHT operating with some additional grant and being sustainable in the long term		Option 3 - JHT operating all its current activities and being sustainable in the long term	
Action	'000	Action	'000	Action	'000
Potential Annual Savings:		Potential Annual Savings:		Potential Annual Savings:	
Closure/Relocation of Maritime Mus	£130	Closure / Relocation of Maritime Mus	£130	None	£0
Closure of Hamptonne	£75	6 public open days at Hamptonne	£38		
6 public open days Elizabeth Castle	£125	Core staff (mid management level) cuts	£46		
Loss of formal education service	£203	2% salary reduction across all staff	£34		
Core staff (mid management) cuts	£46				
2% salary reduction across all staff	£34				
Total Potential Annual Savings	£613	Total Potential Annual Savings	£248	Total Potential Annual Savings	£0
Additional Annual Budget Required		Additional Annual Budget Required		Additional Annual Budget Required	
To meet remaining annual operational shortfall	£0	To meet remaining annual operational shortfall	£307	To meet current annual operational shortfall	£555
Fund Site Investment	£0	Future Site Investment		Future Site Investment	
(£100k p.a. can be afforded with above savings)		- Maritime Museum	£0	- Maritime Museum	£100
		- Hamptonne	£0	- Hamptonne	£0
		- Elizabeth Castle	£100	- Elizabeth Castle	£100
		- Mont Orgueil	£100	- Mont Orgueil	£100
		- Jersey Museum	£100	- Jersey Museum	£100
		- La Hougue Bie	£20	- La Hougue Bie	£20
Future Maintenance Liability		Future Maintenance Liability		Future Maintenance Liability	
(£25k p.a. can now be afforded with above savings)		- La Hougue Bie	£20	- La Hougue Bie	£20
		- Archive	£25	- Archive	£25
Total Additional Annual Budget Required	£0	Total Additional Annual Budget Required	£672	Total Additional Annual Budget Required	£1020
Less Additional Income Generation	£0	Less Additional Income Generation	£50	Less Additional Income Generation	£100
Total Additional Grant Requirement	£0	Total Additional Grant Requirement	£622	Total Additional Grant Requirement	£920



5.2.1 A Further Sub-Option

It is worth noting that consideration was given to a sub-option to Option 1 above. The team considered if it would be possible for the JHT to become a sustainable operation within its existing level of State's grant funding whilst keeping Elizabeth Castle open as currently. The team concluded that the only way that such an option could be viable (subject to a detailed feasibility study) would be after a significant investment was made in Elizabeth Castle to revamp its offer AND provide all year round pedestrian access to the castle by bridge or tunnel. In such a scenario, it could make sense to relocate all of the maritime museum and Jersey Museum collections to the castle and make the castle the flagship heritage attraction offer of the Trust.

An alternative scenario regarding the castle would be to consider the commercial opportunity of a significant investment in heritage property lets. A 2007 Locum Consulting report provides further information.

5.3 Next Steps

The findings of this report, together with those of BDO, and the potential options presented here need to be considered by the Department of Education, Sports and Culture. No doubt there could be other options that the Department would wish JHT to consider and analyse. Ultimately the States will need to consider the implications of this review and the options presented and make a decision on the level of services that it wishes to support.

Further feasibility study work will be required before any options can be implemented.



Appendices



1. Sites Managed by the Jersey Heritage Trust¹⁰

1.1 Sites

- 1 Mont Orgueil Castle* - by Deed of Gift of usufruct from the States of Jersey
- 2 Elizabeth Castle* - by Deed of Gift of usufruct from the States of Jersey
- 3 Jersey Museum* - owned through Deed of Gift from the States of Jersey
- 4 No 9 Pier Road* - by Deed of Gift of the usufruct from the Société Jersiaise
- 5 Maritime Museum and Occupation Tapestry Gallery* - occupied under a Lease at Will from Jersey Harbours (property of the States of Jersey).
- 6 La Hougue Bie* - management agreement with Société Jersiaise (the owners of the site).
- 7 Hamptonne* - owned by the National Trust for Jersey. Management agreement with the Société Jersiaise
- 8 Jersey Archive* - occupied under a Lease at Will from the States of Jersey
- 9 Sir Francis Cook Gallery* - occupied by Deed of Gift to the Jersey Heritage Trust by Lady Cook
- 10 Fort Regent Signal Station - management agreement for operation only with the States of Jersey.

1.2 Forts and Towers

- 11 Grosnez Castle - management agreement with Rozel Estates
- 12 Le Hocq Tower - 25 year lease from the Parish of St Clement
- 13 Barge Aground* - management agreement with the States of Jersey
- 14 Fort Leicester - management agreement with the States of Jersey
- 15 MP2 "Radio Tower"* - management agreement with the States of Jersey
- 16 L'Etacquerel Fort - management agreement with the States of Jersey
- 17 La Crête Fort - management agreement with the States of Jersey
- 18 Seymour Tower - management agreement with the States of Jersey

¹⁰ As listed in the Comptroller and Auditor General's report.

* Visited by members of the Locum Consulting team.



- 19 Tour Cârrée* - management agreement with the States of Jersey (pending)
- 20 Lewis Tower* - management agreement with the States of Jersey (pending)
- 21 Archirondel Tower - management agreement with the States of Jersey (pending).



2. Bibliography

Documents Relating Directly to JHT

- 1 Jersey Heritage Constitution
- 2 Jersey Heritage. *Welcome Pack*
- 3 Jersey Heritage Annual Reviews - 2003 and 2004 to 2006
- 4 Jersey Heritage Annual Accounts for 2007 (and draft Accounts for 2008)
- 5 Jersey Heritage. *Audience Segmentation*
- 6 Jersey Heritage. *Digitisation Project*
- 7 Jersey Heritage. *Fundraising Update*
- 8 Jersey Heritage. *Reproduction Fees*
- 9 Jersey Heritage Business Plan 2009-14 - Strategic Financial Plans.
- 10 Jersey Heritage Business Plan 2009-13.
- 11 Jersey Heritage - Beyond 2009, or ... what value does the States place on heritage? - Powerpoint presentation given to ESC by Clive Jones (Chairman of JH Trustees) on 23 January 2009
- 12 Jersey Heritage - Beyond 2009, Part Two - Powerpoint presentation given to ESC by Clive Jones (Chairman of JH Trustees) on 14 May 2009
- 13 Comparison of terms and conditions of employment with States of Jersey - by Allison Soulsby (JH Head of Human Resources) May 2009
- 14 Opinion Leader Report and Action Points
- 15 Jersey Heritage Quarterly Reports (4th Quarter of 2008 and First Quarter of 2009)
- 16 Visitor Attraction Quality Assurance Service (VAQAS) Reports for Jersey Heritage sites - 2008
- 17 Museums, Libraries and Archives Council accreditation letters for Jersey Heritage - November 2007
- 18 Jersey Archive - Letter (Sept 2008) and Audit Inspection Report from Norman James/The National Archives (August 2008) plus Records Advisory Panel (RAP) - Survey of Progress under the Public Records (Jersey Law) 2002 - 6 page report plus Powerpoint presentation given to ESC by Henry Coutanche (President of RAP) on 11 May 2009
- 19 Investors In People report - November 2008



20 Comptroller and Auditor General, October 2009. *Jersey Heritage Trust Financial Review*

21 JHT Income streams

Admissions:

- i) Visitor income and footfall
- ii) Pricing Policy
- iii) Examples of advertising (e.g. in magazines, on maps and buses)
- iv) Press clips from the Jersey Evening Post
- v) Amphibious Vessels: Purchase for use on the West Park to Elizabeth Castle Route - 59 page briefing report presented to the States of Jersey on 8 July 2008, plus a nine page report: Events leading to recommendation to Board to make appointment

Membership

- i) Individual members (original proposal with income targets, printed leaflets and Members Guide 2009)
- ii) Corporate members (Business Associates)

Heritage Lets

- i) Report from Helen Gray, plus correspondence from Bob Dolan
- ii) Current bookings for Forts & Towers
- iii) Brochure, including prices

21. Heritage Venues

- i) Report from Helen Gray
- ii) Brochure, including prices

Trading

- i) Retail Report by John Prescott (and update by Anna Stevens)
- ii) Catering outlets/values
- iii) Publications

23. Fundraising

- i) Sponsors



Other Documents

- 22 Draft States of Jersey Survey of Heritage (July 2009)
- 23 Draft States of Jersey paper on the Economic Significance of Heritage (2009)
- 24 States of Jersey Tourism report (plus Bob Pallot's comments)
- 25 States Greffe, July 2005. *Development of a Cultural Strategy for the Island*
- 26 Burns Owen Partnership, 2005. *New Directions in Social Policy: Developing the evidence base for museums, libraries and archives in England* (Museums, Libraries and Archives Council)
- 27 Department for Culture, Media and Sport, June 2009. *National indicators 8,8,10 and 11: Supplementary data for Local Authorities*
- 28 Jersey Tourism. *2008 Visitor Survey*
- 29 Museums Libraries and Archives Council, July 2009. *Leading Museums: A vision and strategic action plan for English Museums*
- 30 Museums Libraries and Archives Council, June 2008. *Public Libraries, Archives and New Development: A Standard Charge Approach*
- 31 Museums, Libraries and Archives Council and nef consulting, May 2009. *Proving Value and Improving Practice: A discussion about Social Return on Investment*
- 32 National Audit Office, January 2004. *Income Generated by the Museums and Galleries*
- 33 National Audit Office, November 2006. *Culture Media Sport Focus Issue 5*
- 34 National Audit Office, March 2007. *Heritage Lottery Fund*
- 35 National Audit Office, July 2009. *Promoting Participation with the Historic Environment*
- 36 Sarah Horton and Jacqueline Spence, Department of Information Studies, University of Wales Aberystwyth, March 2006. *Scoping the Economic and Social Impact of Archives* (Museums Libraries and Archives Council Yorkshire)

