

ANCESTRAL AND LITERARY TOURISM IN THE EAST MIDLANDS

Final report for the Museums, Libraries and Archives Council

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Executive Summary

This report develops in some practical detail, on the basis of further discussions with possible heritage and tourism partners, the ten recommendations outlined in our Phase 1 report that surveyed Ancestral and Literary Tourism in the East Midlands, identified its characteristics and assessed its potential for development.

1 Ancestral Tourism Project Board

The Project Board, with a lead partner, with agreed terms of reference and resources, clear responsibilities and committed individuals is an essential requirement before any other further work can proceed on a sound footing.

The Project Board could develop organically from the current membership of the Steering Group for this specific study, nevertheless, in principle, its membership should be comprised of:

- Chief Executive of one of the Destination Management Partnerships
- Tourism Director from East Midlands Tourism
- Director of Engagement East , MLA
- County Archivist
- County Museum Development Officer
- Family History Society
- Representative of TICs
- Representative from Tourism Business

With the possible additions of a representative of the historic house sector from English Heritage or The National Trust.

The report outlines issues of terms of reference, membership and role further.

2 Ancestral Tourism Development Coordinator

Overarching capacity and support is required to drive forward the overall direction and objectives of the steering group and to coordinate and support the action plans of the proposed ancestral tourism networks. The Development Coordinator will help to establish the proposed ancestral networks, be responsible for development and delivery of their action plans, as well as communication and coordination between the individual networks so they can best learn from each other, and act as an advocate for what the networks are seeking to achieve in other arenas. The report outlines the key responsibilities for the post in terms of communication, research, marketing, networking, and championing as well as considering issues of skills and experience, salary, location and reporting.

3 Ancestral Tourism Networks

The common purpose of each Ancestral Tourism Network is to explore the potential for, and support the planned development of ancestral tourism within their respective county by developing information resources, access, products and services for ancestral tourists. The aim of this activity is to develop a new niche tourism offer for the county/East Midlands to attract more people to the area. Network members are required to play an active role in developing and delivering the forum's objectives and championing Network activities through their individual or wider organisational networks. The Network will be made up of between 7-12 members, all with an active interest in growing the visitor economy of the county by developing access to collections of interest to family history researchers, supported by the Coordinator.

Once established, the Networks will need to decide their aims collectively, as well as a programme of work or action plan for the two-year period. The report outlines some aims for the groups, as well as likely work areas and resources needed.

4 Online Guides for Ancestral Tourism and Trial Web Promotion

One of the key issues surrounding information provision for potential ancestral tourists is the fragmentation of resources at local level, with a veritable plethora of agencies and bodies providing different elements in the family history jigsaw. There is a pressing need to produce one comprehensive guide, which summarises all the various research resources available to the family history researcher at local (county) level. The document should be widely disseminated to records offices, archives, libraries, museums, historic houses, heritage attractions, TICs *and* tourism businesses such as accommodation providers, indeed anyone who is likely to receive enquiries from potential ancestral tourists. Such a document will then ensure consistency of response to enquiries from both heritage-related bodies *and* frontline tourism businesses. It is suggested that separate guides be produced for each county to a standard template, bringing a level of consistency to enquiry response that is currently missing. The report outlines draft content for the guides and discusses issues such as dissemination.

Family history researchers (and therefore ancestral tourists) tend to be extremely web-literate. It is recommended that in order to complement the proposed production of ancestral guides, urgent consideration be given to adding dedicated ancestral pages to the DMP sites in the three pilot ancestral network areas, given that these sites constitute one of the primary marketing and information sources for visitors to individual counties in the East Midlands area. As such their websites are likely to offer an excellent communication channel with potential ancestral tourists.

In the pilot phase, we would suggest that it would be adequate to create one page on each of the three DMP sites. It is suggested that in order to generate an element of consistency, a template for the content of the page should be created centrally. The report goes on to outline draft content for the web page and the resources required.

5. Information Briefing

The report outlines a programme for a briefing day to raise awareness amongst potential partners of this study to understand the nature of ancestral and literary tourism and the development programme.

6. Training and Skills Development

Given the relative lack of knowledge within the regional tourism agency, DMPs, the heritage sector and wider tourism trade about the ancestral tourism market and the needs and expectations of ancestral tourists, a comprehensive programme of training and skills development will be required at a number of levels. For the networks themselves, including mentoring support, likewise for the coordinator, who may not have background or experience in ancestral tourism, and for the tourism trade itself. The report outlines a coordinated approach to underpin sustainability, looking at issues of course development, delivery and resources.

7. Data capture

A basic requirement of the networks will be to establish better data capture and analysis over time so that their action plans can be tailored to the results found and ancestral tourists better served and encouraged by the networks' joint activity. A starting point for this will be for all front line organisations to collect the same data, through a simple onsite and online survey, from those who are researching their family history and appear to be from outside the county. The report provides both a template briefing for front line staff and a draft survey.

8 East Midlands Trade Support information - Checklist

There is therefore a pressing need to raise industry awareness of ancestral tourism opportunities. A key part of this process will be to help the tourism trade understand that ancestral tourism is everybody's business, and whether they know it or not, all tourism operators are very likely to have come across ancestral tourists in the course of running their business. A second priority must be to help the wider tourism trade to understand that ancestral tourists have very specific needs and desires, and that they are looking for a certain kind of warm welcome, traditional reception, enthusiasm and knowledge from the people they encounter on their very personal journey. The report sketches a checklist for tourism businesses which would highlight the characteristics of this growing market, outline a range of tips for tailoring their business offering to ancestral tourists, and provide them with 'exemplar case studies' to stimulate action.

9 Volunteer development

We envisage any volunteer development programme happening on a county basis, with a view to any programme of activity forming part of the action plan of one of the networks and therefore reflecting local priorities and circumstance. We have floated the notion of a volunteer programme with the potential Network members but, as yet, no clearly articulated project proposals have been expressed by them that they would like to see considered as part of action plans. We have, therefore, laid out some potential issues such as scope, theme, signposting, skills and comparator project for consideration if any firmer plans are mooted.

10 Literary Tourism: Evaluation of Tennyson 2009 and DH Lawrence Festival 2009

The report offers a model brief for a comparative evaluation of the Tennyson 2009 celebrations and the DH Lawrence Festival 2009, which discusses issues of scope, methodology, management, timetable, outputs and resources.

Summary of Resources and Funding Required to Implement Recommendations

Programme Activity	Funding Required	Sources of Funding
Information Briefing Day	About £600	To be met by MLA from internal budget
Project Board	Up to £5000 over 2 years for meetings	Subsidised by budgets of member organisations
Ancestral Tourism Development Coordinator	Salary: £35000-£40000k per annum. Office: £10000 over 2 years Training (covered at 2.6.3): £2100 Total: £118600	£90000 from MLA through Renaissance funding for 2009-11 (not secured).
Ancestral Tourism Networks	Up to £15000 over 2 years for meetings	Subsidised by budgets of member organisations
Ancestral Tourism Action Plans costs include assumed costed elements 1-4 below:	£60000 - £75000 over 2 years (£10000 - £12500 per network per year)	Possible £10000 from Northants CC for action plan and £2000 from Northants FHS for guide
1. Online Guides and Web Promotion	£5475 or £21075 £3000 or £10200	

2. Training and Facilitation for Ancestral Networks	£19,740	
and Training for Tourism Trade	£9740 (£4580 for first workshop later 2 £2580)	
3. Data Capture and Analysis	£9000 over 2 years	Possibility that data collation could be undertaken by DMPs
4. Trade Support Information	£4950 or £13350	Assumed that the 3 DMPs would absorb costs of in house design of £4950
Volunteer Programme	To be determined	To be determined
Literary Tourism Evaluation	Consultants: £12000 over 1 year (2009-10)	Identified funding of £6000 from MLA to match with funds from Lincs .
Total funding required	Up to £211200 - 226200	
Total funding (identified but not secured)		£108000
Total funding in addition (assumed as contribution from member organisations for Project Board and network meetings)		£35550
Funding shortfall (unidentified)		£67650 - £82650

Conclusions and next steps

During the development of these recommendations we have made, what we consider to be, important progress in generating interest from potential partners. We have been impressed with the level of enthusiasm from both the heritage and tourism agencies for some coordinated activity to really work out what efforts should be going into improving the quality of ancestral and literary tourism in the East Midlands.

Assuming that our recommendations are implemented, we felt it was worth highlighting what we would consider to be evidence of the success overtime. We are conscious that this report concentrates on a developing a series of actions and outputs and we wanted to underline what kind of outcomes might be achieved. We think success would be:

- local networks are sustainable in the medium to long term, generating and implementing new ideas

- local pressure grows for additional networks
- interested parties have a better market understanding and there is ongoing analysis of that market in place
- new commercial ancestral and literary tourism products and services begin to be developed
- customer feedback, including web site user numbers, demonstrates that there is an active ancestral and literary tourism market
- the ancestral tourism co-ordinator has a high and positive profile amongst stakeholder groups

To plot a course towards that success, it remains our view that real commitment to the Project Board and the establishment of the Coordinator post are essential prerequisites to any other action.

We consider the key next steps in taking this work forward over the next 6 months are:

1. For the Project Board to be established, which will involve the Steering Group reviewing their joint and individual commitment over a medium term period of 3-5 years, securing the interest of East Midlands Tourism, and agreeing terms of reference;
2. For one of the Project Board to be the lead champion in maintaining momentum, securing funding and driving the project forward until a Coordinator is established;
3. Each Project Board member will need to take responsibility for generating buy in from their own organisation and networks they represent;
4. Identifying a regional champion or leader for the project, which could involve someone outside of the Project Board with influence;
5. Each partner organisation on the Project Board and the organisations they represent needs to be formally asked whether they can make a financial contribution to the project, or whether they can provide in kind support.

6. Once the above is established, the Project Board should review its priorities and start the recruitment process for the Coordinator which could take 3 months;
7. The process for creating a secure Project Board can run alongside signing up potential network members after the Information Briefing day on the 23rd February. There may need to be tacit agreement from individuals rather than organisations in the first instance;
8. Once the Coordinator is in post, he/she can begin to formalise the establishment of the Networks. Once there are in place, the action planning process can begin via the facilitated workshops we've suggested.

1. Introduction and scope of report

This report forms the second stage of a project to research the potential for developing Ancestral and Literary Tourism offers in the East Midlands based on the collections and interests of the region's museums, archives, libraries, historic properties and heritage sites.

The first stage of our work researched current levels of activity that were supporting ancestral tourism and literary tourism in the East Midlands, reviewed relevant collections and resources, analysed tourism and marketing information and evaluation, and assessed the potential market for any ancestral and literary tourism offers, based on the data available. We also reviewed comparator projects in Scotland and Wales to learn lessons and ensure proposals are likely to be delivered effectively. In considering whether a development 'model' could be transferred to the East Midlands, the review analysed the main success factors and characteristics central to their success¹.

We concluded that ancestral tourism and literary tourism in the East Midlands can best be described as taking place 'under the radar' at present. There is evidence of activity but precise quantification of current activity levels is problematic, making estimation of likely growth difficult.

Our conclusions, which were accepted by the Project Board, were to proceed with developing a programme of activity whose purpose will be to overcome some of the limitations we identified, namely, to:

- Act as catalysts for collaborative action at a local level, bringing together partners from archives, museums, libraries, family history societies, tourism businesses and tourism agencies (among others) to explore ancestral tourism opportunities together;
- Raise industry awareness of ancestral tourism opportunities and place ancestral tourism 'above the radar' of perception and systematic data capture;
- Provide exemplar projects to inspire others;
- Enable action research to be undertaken in order to incrementally build the case for ongoing investment in ancestral tourism – development of ancestral tourism itself being best done in an incremental fashion;

¹ For a copy of the full first stage report or the executive summary please contact by emailing katie@culturalconsulting.net or by calling 07919 140747

- Act as means by which some of the softer elements of sustainable partnership – good communication, appreciation, mutual understanding and trust - which are lacking at the moment, can be generated;
- For literary tourism, to evaluate the value of current initiatives as a starting point for developing further products on a sound basis.

We set out a number of recommendations in our first stage report which we considered to be a series of actions that would incrementally and collectively form a sustainable programme of activity for developing ancestral and literary tourism in the East Midlands, based on two necessary prerequisites to establishing any ancestral tourism activity – leadership and capacity. Therefore, our first two recommendations were:

Recommendation One: Leadership – Ancestral Tourism Project Board

We strongly recommend that the Project Board review and analyse the commitment of their organisations, and the sectors they represent, to the development of ancestral and literary tourism. Without clear overall direction and leadership we do not believe that any ancestral tourism development initiative can succeed. We would therefore, have to recommend that no further action on development should take place, as we consider it would be doomed to fail and raise expectations amongst potential partners that cannot be met.

Recommendation Two: Capacity – Ancestral Tourism Development Coordinator

The establishment of a development post to coordinate the development of ancestral tourism in the East Midlands. The post holder would be responsible to the overall steering group and would be expected to manage a coherent programme of activity in order to maximise impact and the value of the work, and to start to build longer-term relationships

Following on from these first two essential elements, we proposed a programme of activity which we tested with a selection of those interviewed from archive, libraries, museums and heritage sites to act as **building blocks** to longer term relationships and tourism development:

Recommendation Three: Ancestral Tourism Networks

The establishment of three Ancestral Tourism Networks in Nottinghamshire, Northamptonshire and Lincolnshire. We selected these counties as we believe that Lincolnshire and Northamptonshire have histories and geography distinct from the other three counties but that

Nottinghamshire, Leicestershire and Rutland, and Derbyshire have more in common, so of the latter 3 any could serve as a pilot.

Recommendation Four: Collaborative development of Ancestral Tourism Guides

Each local network will have its own ideas about its action plan, but it is highly likely that the production of a local guide (web published) to ancestral tourism resources and opportunities will feature in the plans. Our recommendation is that an expectation be placed on the local networks that such a guide will be produced, though the group will be free to decide the nature and scope of the guide it produces.

Recommendation Five: Project information seminar

General information seminar and briefings on the results of the ancestral tourism research to raise awareness within the mla, tourism and historic properties sectors of ancestral tourism characteristics and opportunities, and to act as a catalyst for partnership-based approaches to the incremental exploration of ancestral tourism opportunities. The date for this information briefing is set for 23 February 2009.

Recommendation Six: Tourism information and training on Ancestral Tourism

Ancestral Tourism information seminars/briefings for the East Midlands DMPs and TIC staff to brief them on Ancestral Tourism, how it works, market characteristics, comparators and opportunities for the East Midlands.

Recommendation Seven: Standard Information Collection

Develop a simple briefing on ancestral tourism and guidance on data capture for TIC enquiries, archives, libraries and museums to start to collect consistent data on activity. Produce recommendations on the collation and coordination of data.

Recommendation Eight: Development of Tourism information

Explore the interest of the EMT Quality Managers in supporting Ancestral Tourism within the East Midlands and scoping how it would fit within existing work programmes and priorities. In addition, explore the potential for producing a checklist for tourism businesses on ancestral tourism e.g. In the form of a Q book.

Recommendation Nine: Scope potential for volunteer development in Ancestral Tourism

Given the strong, local interest in family history research demonstrated by the many local history museums there is a potential to harness this interest to develop 'Ancestral Tourism' champions amongst the voluntary sector – drawing in people from local studies libraries, museums, historic houses, community archives and archive services, as well as family history societies. Volunteering opportunities and training, focussed on supporting family history research and ancestral tourism (or aspects of it such as cataloguing of specialist collections), could be developed.

Recommendation Ten: Literary Tourism – Evaluation of Tennyson 2009

Our research found that there were no existing consistent evaluations of literary tourism initiatives in the East Midlands that could act as a sound basis for the development of new products. The programme of activity developed to support the celebration of the 200th anniversary of Tennyson's birth therefore offers an opportunity to make a start. We recommend a programme of evaluation is developed to assess the value of the process of developing and delivering Tennyson 2009 and the tourism impact of visitors. We envisage that the evaluation proposals would cover both process and tourism impact.

This second stage report aims to flesh out the recommendations outlined above with further practical detail on implementation, potential partners, resource, funding and timetabling issues, which we have developed in communication with the Project Board and potential heritage and tourism partners in the East Midlands.

2. Development of Recommendations

2.1 Ancestral Tourism Project Board

The Project Board, with a lead partner, with agreed terms of reference and resources, clear responsibilities and committed individuals is an essential requirement before any other further work can proceed on a sound footing.

The Project Board could develop organically from the current membership of the Steering Group for this specific study, nevertheless, in principle, its membership should be comprised of:

- Chief Executive of one of the Destination Management Partnerships
- Tourism Director from East Midlands Tourism
- Director of Engagement East , MLA
- County Archivist
- County Museum Development Officer
- Family History Society
- Representative of TICs
- Representative from Tourism Business

With the possible additions of a representative of the historic house sector from English Heritage or The National Trust

2.1.1 Issues for Consideration

We are keenly aware that the Project Board needs a lead partner and yet that ancestral tourism is not currently a corporate priority for any of the organisations that could contribute to the Project Board.

The role and capacity of MLA East Midlands, the commissioning body for this research and development phase, will be different from March 2009. It will no longer operate as an independent organisation and will be part of MLA, with a Regional Director of Engagement covering East Midlands, East and South East and 3 regional managers for the area, together with 3 Area Engagement Advisers which reduces its capacity significantly.

It is our view that, on balance, one of the Destination Marketing Partnerships, or East Midlands Tourism would be best placed to act as lead partner in the medium term and that, for continuity with the proposed networks, it would make best sense for this to be either Lincolnshire, Northamptonshire or Nottinghamshire. We know that the DMPs are meeting as a group on 15th January, and assume that discussion of the Project Board and its leadership can be covered at the meeting of the Steering Group on 19th January with a view to clarifying responsibilities to some degree by the end of January.

2.1.2 Draft Terms of Reference for the Ancestral Tourism Project Board

Role

The primary role of the Project Board will be to provide strategic leadership and advocacy for the development of ancestral tourism in the East Midlands initiative and to support and motivate the proposed three Ancestral Tourism Networks to deliver through the Ancestral Tourism Development Coordinator

Aims and Objectives

- To act as a group in articulating and directing a vision for the development of ancestral tourism in the East Midlands;
- To work together with public sector bodies, industry & the wider community to identify opportunities for the development of tourism using genealogy as a driver;
- To act as a group championing the value of ancestral tourism to the East Midlands to external bodies and potential partners and supporters;
- To ensure ancestral tourism has a high profile with each member's own organisation and that the aims of each Network are understood and supported corporately;
- To direct and monitor the work of the Ancestral Tourism Development Coordinator in developing and managing the three Networks in Lincolnshire, Northamptonshire and Nottinghamshire;
- To facilitate relevant product development and marketing of any consumer facing products
- To evaluate the outputs and impact of the Ancestral Tourism Development Coordinator and the action plans of the three networks;
- To seek and apply resources and funding from each member's organisation in support of the Project Board's objectives.

Frequency of Meetings: Up to 4 per year

Length of term: The Project Board would need to have a shelf life of 5 years, to reflect the long term commitment required to achieve a significant return on investment.

Administration: The Ancestral Tourism Development Coordinator would act as Secretary to the Project Board with responsibility for arranging meetings, organising agenda and minute taking.

Review of terms of reference: annually.

Resources required: meeting room space, refreshments, minor stationary, travel cost to a total of about £2,500. However, given the nature of support that the Project Board could readily provide it is assumed that all members would offer meeting room space, refreshments and a contribution to travel costs from their own resources so the majority of the costs could be absorbed.

2.2 Ancestral Tourism Development Coordinator

Overarching capacity and support is required to drive forward the overall direction and objectives of the steering group and to coordinate and support the action plans of the proposed ancestral tourism networks. It was clear to us from our discussions with tourism agencies and staff in archives, museums, libraries and the wider heritage field that there was a good deal of goodwill and ideas for joint working across their organisational boundaries but no additional capacity internally to make such aspirations a reality. Neither did there seem to be sufficient focus from specific individuals to make something happen without an additional coordinating role.

Experience from Scotland, where networks have been established with and without extra capacity, suggests that those with extra capacity are much more likely to deliver the outputs of their action plans and succeed.

The Development Coordinator will help to establish the proposed ancestral networks, be responsible for development and delivery of their action plans, as well as communication and coordination between the individual networks so they can best learn from each other, and act as an advocate for what the networks are seeking to achieve in other arenas.

2.2.1 Issues for Consideration

Chain of command/reporting: The post holder would need to sit between the Project Board and the Network, reporting to the former and managing the latter. This relationship would need embedding carefully to ensure that expectations on both sides are clear;

Employing body. There would be advantages in one of the Project Board members acting as the employing body, such as EMT, one of the DMPs or an archive service, as all have previous models for similar kinds of posts;

Location: From a logistical point of view, Nottingham would seem the best place for the post to be based so that travel could be made more efficient. From the post holder perspective some

desk space at a DMP and at an archive/museum would be advantageous for knowledge development. The post holder would not necessarily need to be housed by the employing body;

Skills and experience: Those interviewed were generally of the view that the ideal skills and experience were unlikely to be found ready-made in one individual, given the highly specialised nature of the post and the mix of heritage and tourism facets. In recruitment, we would, therefore, recommend that more weight is applied to the generic skills of potential candidates than previous knowledge and experience. This is reflected in 2.2.2 below;

Flexibility: previous experience indicates that it can be difficult to recruit to posts of this nature. We would recommend that the post is advertised as a potential job share, or as a secondment and with the option for home working;

Salary: We believe that a salary of between £35-£40k would be required to attract candidates of the right calibre, given the range of skills required, the heavy job weight and the degree of independent working and initiative required. The salary scale may need to be reconciled with the employing body and follow a job evaluation process which would slow down recruitment. This will need to be factored into any decision about the best employing body, It may be that the DMPs have more flexibility than local authorities in this regard;

Resources required: Assuming an initial contract for a period of 2 years from 2009 to 2011 with a salary of £35-£40k, the funding required would be £100k (£40k x 2 plus on costs of 22% plus inflation uplift of 2% in second year). On top of this would be recruitment costs of £1.5k and travel expenses of £5k over 2 years. It is assumed that the cost of office space, computer and minor administration would be absorbed by the employing body. If this were not possible a further £10k would probably be required. NB: this level of resources would not offer the Coordinator any budget of their own;

Funding sources: MLA has applied for a contribution towards this post (and other actions) to the value of £90k over 2 years from March 2009, which forms part of the Renaissance business plan. We would expect that other key members of the Project Board, such as the DMPs, EMT and the archive service, would contribute to the post, rather than the Networks. We understand that the DMPs do not have significant amounts of uncommitted funds and that it may be easier for them to contribute funding to direct marketing activity to support the Network's action plans, in which case it would make sense for any Renaissance funding to be directed solely at funding the Coordinator.

2.2.2 Ancestral Tourism Development Coordinator Draft Job Description

Job Purpose

The post holder will be responsible for the development and management of three Ancestral Tourism Networks in the East Midlands focused on the three counties of Lincolnshire, Northamptonshire and Nottinghamshire. The post holder will work with the Ancestral Tourism Network members to formulate and drive forward a coordinated action plan for development in

each of the three counties and act as the focus for the networks' advocacy and communication with other organisations, businesses and agencies in the heritage and tourism sectors.

Reporting to:

East Midlands Ancestral Tourism Project Board, which consists of representatives from East Midlands Tourism, one of its county-based Destination Marketing Partnerships, Museums, Libraries and Archives East Midlands, Northamptonshire Record Office and a county-based museums development officer.

The role of the Project Board will be to define and steer the Coordinator's programme of work, to identify priorities and to monitor progress towards defined targets, which will include implementation of the action plans.

Main responsibilities

Development of Networks

- To work with the members of the three county based Ancestral Tourism networks to develop tailored action plans for ancestral tourism development;
- To be responsible for managing the delivery of the three bespoke action plans and coordinating the responsibilities of network members, having particular regard for the resource, funding, timetabling and evaluation elements of the action plans;
- To manage any contractors, temporary staff and volunteers appointed to deliver elements of the action plans;
- To act as a link between the three networks themselves to foster cooperation, learning and any joint activity.

Research

- To be familiar with and to disseminate research, best practice and product development support models initiated within the UK, particularly in Scotland for the benefit of East Midlands;
- To lead on any research specifically commissioned by any of the Networks as part of their respective action plans.

The Market

- Dissemination of existing market research and ensuring network members and others have an understanding of the findings and implications;
- To be responsible for collating and analysing data captured by network members from actual or potential ancestral tourists and to produce reports with recommendations for action plans and any product development;

- Encourage network members and businesses to carry out their own research and provide templates, advice and assistance to help with this.

Product Development

- To be responsible for managing new product development which arises as part of the action plans, including identifying any gaps in resources,
- Identify expertise/skills gaps on the ground which would hinder implementation and seek opportunities to resolve them;
- To ensure that the action plans remain sufficiently flexible to allow for other product development opportunities that might arise from over period of plans;
- To develop plans and undertake evaluation of the Networks and their action plans to measure effectiveness and impact.

Networking and Facilitation

- To lead awareness raising sessions and information briefings on behalf of the Networks to engage local businesses and other partners outside the formal membership of the Networks
- To support the Networks in raising the profile of ancestral tourism with their own constituencies,
- To facilitate links between the various sectors of the ancestral tourism industry e.g. accommodation providers, transport, attractions etc.
- Act as key contact for businesses interested in ancestral tourism product development, seek the engagement of businesses in the action plans and signpost businesses with ideas to the right sources of help.
- Develop a local database of community of interest for ancestral tourism for each Network.

Championing & Advocating

- Act as a champion for the interests of the three Ancestral Tourism Networks in external environments, especially with tourism business and accommodation and travel providers;
- Proactively seek opportunities outside the Networks to influence the heritage, tourism, education and cultural sectors in East Midlands
- Ensure links to any key national and international events and initiatives with potential to deliver the Networks' action plans are exploited.
- Work with any external expertise in developing a programme of training for network members in best practice in ancestral tourism;
- Support Network members in providing training to their own constituencies.

Communication

- Organise and co-ordinate the Project Board meetings and those of the Networks, including all administration;
- Develop and implement a communication plan for each of the three Networks;
- Raise awareness of the Networks through regular correspondence with existing members of the networks and through developing new networks and contacts;
- Ensure that the Networks related portals, websites and e-communication is of good quality and up to date, including that related to any online guides and sources of information.

Skills and Experience Required

1. A degree or equivalent qualification in a relevant subject;
2. At least 3 years experience of working in the marketing, cultural, education or heritage sector, not necessarily in a role connected to family history, and a strong and demonstrable commitment to, and empathy with, the main purposes of this role;
3. A high level of inter-personal and advocacy skills, including the ability and confidence to work with and influence people at all levels and act in a representational role;
4. The ability to develop and maintain good working relationships with others and the confidence to speak in public and make media appearances;
5. Sound judgement, including the ability to remain calm under pressure;
6. Excellent written communication skills, including experience of report-writing and the ability to draft material in a variety of appropriate formats, from formal reports to press releases to web pages;
7. Strong powers of reasoning, including an ability for original, creative and lateral thought;
8. The ability to assimilate information quickly and to rapidly become familiar with a wide range of issues and in turn to communicate that understanding to others;
9. Strong strategic planning and organisational skills, including development and delivery of business/action plans and evaluation programmes, the ability to manage large workloads and competing demands and to remain organised;

10. Computer literate with a working knowledge of word processing, database and spreadsheet packages, and familiarity with the use of the Internet as a research tool;
11. Willingness and ability to travel around the East Midlands and occasionally other parts of the UK (normally by public transport)

Location:

Based primarily in Nottingham, but it is expected that the post will be essentially peripatetic serving the 3 ancestral tourism networks in Lincolnshire, Northamptonshire and Nottinghamshire as well as the Project Board.

Salary

Up to £40,000 per annum depending on skills and experience.

Length of post: initial two-year fixed term contract with the possibility of extension.

2.3 Ancestral Tourism Networks

2.3.1 Issues for Consideration

County focus: As agreed we have focussed our efforts on three county based Networks in Lincolnshire, Northamptonshire and Nottinghamshire. Clearly the Networks would not operate entirely independent of one another and the role of the coordinator would be to maximise cross fertilisation to the benefit of all;

Membership: Suggested membership includes: Tourism agency, TIC, Tourism businesses, Archive, Local studies library, Family history society, National Trust and/or English Heritage, Museum, Other attraction, Arts/culture agency or business and a professional researcher or registrar. We envisage that these networks will have membership that reflects the heritage strengths of each county, for example representation from stately homes and estates will be important for Northamptonshire. Each network should comprise a minimum of seven members and a maximum of twelve;

Action plans: . Each network will be asked to draw up and implement an action plan that is achievable within a realistic timeframe and within the resources available. The catalyst for the action plan will be a development/awareness workshop facilitated by the project consultants. The action plan must include evaluation and dissemination. An initial two-year action plan, covering the period of the coordinator's contract would seem sensible;

Resources required: We envisage that the networks will meet up to 4 times a year, as for the Project Board, and that the kind of costs and level of funding to service them ticking over will be similar - namely in the region of £2,500 and that this would be subsidised by members offering

meeting rooms, refreshments and charging travel costs to their own organisations. In addition, some training and facilitation will be needed to bed down the Networks (which is dealt with in 2.6 below);

More significant resources will be required to take forward the action plans of the Networks, because their formulation needs to come from the Networks, we can only best guess what the resources required might be. Taking into account experience in Scotland and assuming that each action plan includes production of a guide and web promotion (2.4), awareness raising with others, information briefings, shared costs of training (2.6), marketing effort, data collation and evaluation (2.7), dissemination, minor product development and evaluation the costs over 2 years could be in region of £20000 to £25000 per network.

2.3.2 Purpose and role of network

The common purpose of each Ancestral Tourism Network is to explore the potential for, and support the planned development of ancestral tourism within their respective county by developing information resources, access, products and services for ancestral tourists. The aim of this activity is to develop a new niche tourism offer for the county/East Midlands to attract more people to the area. Network members are required to play an active role in developing and delivering the forum's objectives and championing Network activities through their individual or wider organisational networks.

The Network will be made up of between 7-12 members, all with an active interest in growing the visitor economy of the county by developing access to collections of interest to family history researchers.

It is anticipated that meetings will be held up to four times a year, with the group having an anticipated lifespan of 2-3 years. The work of the Network should be supported by an Ancestral Tourism Co-ordinator post – externally funded for an initial period of 2 years.

Once established, the Networks will need to decide their aims collectively, as well as a programme of work or action plan for the two-year period. Outlined below are some suggested broad aims for the group, as well as likely work areas.

2.3.2 Broad aims

- Establish a project partnership of heritage and tourism organisations to develop ancestral tourism products and services in Nottinghamshire/Lincolnshire/Northants;
- To develop understanding of the ancestral tourism market, and the role each partner/sector could play in developing this area in Nottinghamshire/Lincolnshire/Northants;
- To establish a forum for information exchange and the sharing of ideas on product and service development, in particular the availability of relevant information for ancestral tourists;

- To develop information on relevant collections and information held by partners (and related organisations) and make it readily and easily available to ancestral tourists;
- To develop links to other organisations and information resources/sites with an interest in ancestral tourists;
- To promote the work of the Network to relevant organisations and potential partners.

2.3.3 Potential work programme/activities

- Agree aims and terms of reference, and constitute the Ancestral Tourism Network;
- Audit relevant collections, services and existing information resources of each organisation in the Network to assess their relevance to the Ancestral Tourism market;
- Audit information resources held by related organisations in the county known to the Network partners through other contacts and memberships;
- Assess the relevance and usability of the resources and produce plans for new collective information resources for ancestral tourists, including publication and dissemination plans;
- Collate, produce and publish new resources;
- Promote the work of the Network and in particular the availability of new resources;
- Draw up and implement plans for the evaluation and tracking of use of the new resources, e.g. data capture form on website;
- Undertake a programme of information seminars/training on Ancestral Tourism to develop the knowledge and expertise of participants.

NB Much of this work will be supported by the Ancestral Tourism Coordinator but capacity will need to be made available from individual organisations to work on the new information and guidance.

2.3.4 Benefits of an Ancestral Tourism Network

- New partnership working between the heritage sectors servicing Ancestral Tourists and the tourism organisations marketing and developing tourism offers in the county;
- New shared information resources and joined up working across the archive, library and heritage sectors, and better awareness of their collective services and offer amongst the tourism sector;
- Better knowledge and understanding of ancestral tourists, their needs and wants through business engagement and specialist training;
- Improved awareness amongst potential tourists, and conversion of awareness to visits through online and offline promotion of services and resources;
- A legacy of tailored information resources and potentially packages, to ensure ancestral tourists get the most from their experience of Nottinghamshire/Lincolnshire/Northants before, during and post visit;
- New information on the interest in/demand for ancestral tourist services and information through systematic data capture.

2.3.5 Development of Ancestral Tourism Networks

During December and January we have been discussing the level of interest in joining the Networks with potential members, following the model outlined above, in Lincolnshire, Northamptonshire and Nottinghamshire and asking of potential member what their aim would be, what they would like to get out of it and the skills and resources they would have to contribute.

For each of the county networks we have produced a summary of interest and contacts that could be used by the Coordinator as the basis for forming the Networks. These can be found at Appendix 1.

2.4 Online Guides for Ancestral Tourism and Trial Web Promotion

One of the key issues surrounding information provision for potential ancestral tourists is the fragmentation of resources at local level, with a veritable plethora of agencies and bodies providing different elements in the family history jigsaw.

There is currently no forum for basic information exchange amongst the heritage providers about resources they each offer that would help ancestral tourists at a county or regional level, although there are networks that exist for other purposes.

The basic potential signposting and referral role of libraries, museums and heritage sites between each other and to archival services therefore tends to be haphazard, sporadic and reliant on individual staff relationships rather than systematic. On the other hand many individual organisations have information leaflets on how to go about family history research, resulting in a great duplication of effort around general guidance for researchers rather than specific signposting to other sources of information and help in that locale.

There is virtually no sustained interaction between archives, libraries and museums and the tourism agencies and private operators or family history societies, even in terms of general promotion of what tourists might be interested in, quite aside from the desires of ancestral tourists.

It is very rare for a trade operator to contact an archive, library or museum, and if this does happen it is not likely to be connected to ancestral research. There is more contact between historic sites and properties and the tourism industry, but this tends to be as part of a themed package related to other aspects of history and heritage. This begs the question as to how (if at all) tourism operators are currently signposting enquiries from potential ancestral tourists.

It is suggested that there is therefore a pressing need to produce one comprehensive guide, which summarises all the various research resources available to the family history researcher at local (county) level. The document should be widely disseminated to records offices, archives, libraries, museums, historic houses, heritage attractions, TICs *and* tourism businesses

such as accommodation providers, indeed anyone who is likely to receive enquiries from potential ancestral tourists. Such a document will then ensure consistency of response to enquiries from both heritage-related bodies *and* frontline tourism businesses.

To achieve the widest possible dissemination, it is suggested that the document should be produced in electronic (pdf) format so that it can be made available on websites, emailed to enquirers and printed off on request. It should be noted that ancestral tourists/family history researchers are by their very nature extremely web-literate, and a hard copy version of the guide is unlikely to be required.

It is anticipated that as much of the material is already likely to exist in one written form or another, whether it be website or hard copy, production of the guide will essentially be a process of pulling together and editing existing information. The task should therefore be less onerous than might initially be envisaged.

It is suggested that separate guides be produced for each county. Whilst the detail of individual resources available at local level will vary from county to county, it is further suggested that all the guides should be produced to a standard template, bringing a level of consistency to enquiry response that is currently missing.

In order to meet the wider tourism objectives of this project, it is recommended that the guides also contain a significant element of promotional copy, 'selling' the concept of a visit to walk in the footsteps of your ancestor as a logical next step in the ancestral quest.

Distribution channels should include the following: TICs, front line tourism businesses (in particular accommodation and heritage-type visitor attractions), County Records Offices, Libraries, Museums, Archives, local Family History Societies, local history societies, other relevant heritage bodies.

2.4.1 Draft Content for Online Guides

- Introduction
- Getting started on your family history quest
- Summary of main records eg. General Register Office Indexes, Parish Registers etc
- Where the records are kept and how to access them – to include address for County Records Office, brief summary of the records it holds and the services it can offer

- Census Records
- Other avenues for the family history researcher
- Gravestones
- Newspapers
- Archives
- Universities
- Maps & Plans
- Photographic Collections
- Local Studies Collections (Libraries)
- Local Family History Society
- Where to go for additional help – outline any commercially-available assisted research services (Local Authority or otherwise)
- Summary of additional resources available to researchers by town eg. Town Council Records, Newspapers, Maps, Archival Sources, Education Records, Poor Relief, Burial Records etc
- Useful web addresses – research, local history, heritage, museums, archives, universities, special collections, tourism
- Done your research? Now why not come and walk in the footsteps of your ancestors?
- ‘Selling’ copy
- Testimonials from previous ancestral tourists
- How to plan your visit
- Link to tourism website
- Booking your accommodation
- TICs
- Quality Schemes
- Places of ancestral interest – highlight visitor attractions likely to be of interest to ancestral tourists. Listings to include name, address, short description and web address

Resources Required

Production of the proposed guide need not be a particularly onerous task, assuming that all the information already exists in one form or another. As indicated, the main task will be to pull together information from existing resources and edit it. Thereafter there will be an onus on relevant bodies to check the accuracy of information relating to their records/archival sources.

There are three options that could be considered:

1. The proposed Development Co-ordinator takes on the task of producing the guides on behalf of the individual networks. By utilising the Project Manager resource, no further staffing costs are incurred.
2. A Consultant is commissioned to produce the guides on behalf of the individual networks
3. An individual (or individuals) from within each network takes on the task of producing the guide for their network area. This option, whilst not incurring any additional staffing costs, would inevitably involve a degree of re-prioritisation of current workloads and activities in the short term.

In order to ensure the sustainability of the guides, which may require updating on a reasonably regular basis, it will be important to give consideration at an early stage to future ownership and maintenance arrangements.

As a rough guide, it should be assumed that around 13 days of work would be required for production of each guide (this does not include time required for checking/proofing by relevant bodies).

Whilst Options 1 and 3 would not incur any additional staffing costs, Option 2 would incur consultancy costs of around £5,200 (exc. VAT) per guide, assuming consultancy fees of £400 per day.

In addition, the following costs are estimated:

Design	£1,000 per guide
Typesetting	£750 per guide
Production of pdf	£75 per guide
Distribution	Can be carried out at no cost if distributed electronically

Total cost: Option 1 £1,825, Option 2 £7,025, Option 3 £1,825 (exc. VAT)

2.4.2 Trial Web Promotion

Family history researchers (and therefore ancestral tourists) tend to be extremely web-literate, and there is a strong expectation from this market that they will be able to access information online, either to aid their research or to help them plan a visit to walk in the footsteps of their ancestors.

At the present time, whilst some of the DMPs promote connections with literary or other figures on their websites, none actively promotes ancestral tourism. It is recommended that in order to complement the proposed production of ancestral guides, urgent consideration be given to adding dedicated ancestral pages to the DMP sites in the three pilot ancestral network areas, given that these sites constitute one of the primary marketing and information sources for visitors to individual counties in the East Midlands area. As such their websites are likely to offer an excellent communication channel with potential ancestral tourists.

The simplest way to create an ancestral presence on these sites in the short term would be to create an HTML-embedded menu button on the home page of each site, entitled 'Researching Your Family History', with a 'click through' to a dedicated ancestral page. Although the aim is ultimately to generate additional tourist visits, it is likely that 'Ancestral Tourism' will not have the same resonance with visitors to the site as 'Family History', and for this reason we would suggest that family history is used as the hook with which to draw people to the page.

In the pilot phase, we would suggest that it would be adequate to create one page on each of the three DMP sites. A major benefit of these pages is that they will provide a dedicated communication channel with ancestral tourists whilst enabling activity levels to be measured via monitoring of 'click throughs' and page views. It is suggested that in order to generate an element of consistency, a template for the content of the page should be created centrally. However design should be carried out by the DMP's own web team, so ensure synergy with the wider site.

The page should essentially be promotional in nature, and whilst providing a degree of information to aid family history researchers, its primary aim should be to promote the emotional experience of visiting to walk in the footsteps of your ancestors.

2.4.3 Draft content for the DMP web page

- Introductory copy
 - So you had ancestors from xxxxxxxx and you want to discover their family history?
- Research resources

- How to get started
- Brief summary of main resources with web links
- Highlight the ancestral guide as a tool to help with family history research. Pdf of guide available as a download.

- Done Your Research? Now why not come and walk in the footsteps of your ancestors?
 - Highlight the emotional experience of following up your research with a visit
 - Summary of ancestral highlights in the area
 - Highlight the warmth of the welcome ancestral visitors will receive
 - Quality accommodation – how to book
 - TICs – will provide you with information on sites that may be of interest to your family history search and signpost you to further sources of help and information on the ground.

- We'd like to find out more about your family history search.
 - Link to incentivised data capture form (see data capture template)
 - Opportunity to enter into a prize draw to win e.g. a short break/your own family tree researched by a professional genealogist etc

As linkages will help optimise search engine facilities, consideration should also be given to offering standard banner adverts and/or paid links for family history, visitor attraction and other genealogy-related business sites. Links should be offered on a reciprocal basis, in order to drive as much traffic as possible to the site.

Whilst the creation of dedicated ancestral pages on the DMP websites will help determine market demand in the short term, (and indeed it would be extremely beneficial if the DMPs maintained these pages on their sites on an ongoing basis), it is anticipated that in the longer term, individual local ancestral networks may wish to share resources and create a more comprehensive online presence of their own that everyone involved could link to (and from). We would strongly recommend that where these portals are created, this is done on a county-wide basis, given that the affinity of most ancestral tourists will be with a county rather than a region.

A network web portal could be developed as an effective signposting mechanism (and the first port of call) for people looking to begin their family history research. In addition it could have unlimited tourism potential.

Possible content for a comprehensive network web portal could include the following, although it should be noted that development of a portal of this nature is probably best done incrementally :

Researching Your Roots

- detailed information on research resources held locally, with links to relevant websites

How your ancestors would have lived and worked

- features designed to bring 'colour' to the family history researcher's personal family quest

Occupations

- information on key occupations through the ages
- Industrial heritage

Profiles of key figures connected with the area through the ages

Photographic library of xxxxxx through the ages

Video footage

Oral history – reminiscences/stories

Why you should visit

Testimonials from previous ancestral visitors

Towns and villages

Places to stay

Tourist Information

Ancestral Highlights – listings of relevant visitor attractions

Ancestral Event Listings

Links page

Ancestral Forum

- post your thoughts and comments and share information on your ancestral quest with other like-minded people

Register to Stay Informed

- sign up to receive regular e newsletter. This would provide an effective data capture mechanism as well as a marketing channel to potential ancestral tourists.

Product information – details of visitor passes, themed trails, ancestral packages etc as these are developed

Advertising from suppliers – to include standard banner adverts and ‘paid for’ links. Again, it will be important that these links are established on a reciprocal basis in order to optimise search engine facilities and drive as much traffic to the site as possible.

Resource Required

Production of the proposed trial web page should not be a major task. There will be an element of basic copywriting involved in drafting the text for the page, plus input from the local records office in providing a brief summary of key records available in the area. It is assumed that most of the DMPs will have existing web teams, or at least a Webmaster who maintains and updates their website on an ongoing basis. Where they do not have their own internal Webmaster, website maintenance and development is likely to be outsourced to an external agency. In either case, design and technical backup to get the site live should be a fairly straightforward process.

There are two options which could be considered:

4. The proposed Development Co-ordinator takes on the task of producing the copy for each web page, including liaison with the local records office/DMP to gather the relevant ‘tailored’ information such as local records and ancestral highlights. By utilising the Project Manager resource, no further staffing costs are incurred.
5. A Consultant is commissioned to produce the pages on behalf of the individual DMPs.

As a rough guide, it should be assumed that around 4 days of work would be required for copywriting the page template. Where the ‘tailored’ information is not provided by the local

records office/DMP and has to be researched and collated by the Development Co-ordinator or an outside consultant, this is likely to take a further 2 days per DMP area.

Whilst Option 1 would not incur any additional staffing costs, Option 2 would incur consultancy costs of around £1,600 (exc. VAT) for production of the page template, assuming consultancy fees of £400 per day, and a further £800 per DMP area for collation of the 'tailored' information.

In addition, the following costs are estimated:

Design (if outsourced to an external agency)	£500 per DMP area
Technical support (if outsourced to an external agency)	£500 per DMP area

Total cost per DMP: Option 1 £1000, Option 2 £3400

Note: the above costs are only applicable if the DMP has to outsource web design/technical support to an external agency. If this is handled internally, the costs outlined would be significantly reduced.

Network Web Portal

Whilst costs would depend on the scope of the desired site, experience suggests that a good quality (but reasonably basic) ancestral web portal, including design, software development and technical support, could be created for around £6,000 (note: this does not include copywriting)

Additional factors to consider if the networks choose to go down this route include hosting, ongoing maintenance and updates, plus future development costs.

2.5 Information briefing

In order to raise awareness amongst potential partners of the work undertaken to understand the nature of ancestral and literary tourism in the East Midlands so far and this development programme, we have agreed with the Steering Group to lead an information briefing day within the scope of our contract, which is being organised by MLA.

2.5.1 Issues for consideration

<p>Promotion: the timetable for marketing this event is tight and the Steering Group should be advertising the event as quickly as possible through their usual communication channels;</p>
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Target audience: the key people that should be attending are the potential Project Board members, the potential network members from the three counties, those we need to influence such as EMT, as well as heritage and tourism staff from the other counties outside the three pilot areas;

Softer outcomes: we are aiming for the event to act as a means for people from different parts of the ancestral tourism picture to get to know each other and start the process of developing some understand of each other's role and motivation. This is perhaps more important than transferring knowledge about the project's findings;

Risk: There is a potential reputational risk to the Steering Group membership if the group is not collectively able to answer clearly issues about the leadership and management of the proposed Project Board, which could affect the momentum we hope the day will generate;

Resources required: venue hire, refreshments, and administration all of which will be met by MLA internal budget. Cost of consultants is contained within contract price.

2.5.2 Ancestral and Literary Tourism Information Briefing Day Draft Programme

Aims of the day:

- To present the findings and recommendations of the Ancestral and Literary Tourism research project
- To inform attendees about Ancestral Tourism in more detail – its general characteristics, profile of ancestral tourists and current trends and opportunities (including case studies) based on Scottish experience
- To discuss the recommendations relating to Ancestral Tourism in the East Midlands, and ascertain interest in developing this work further in the region
- To organise a networking event which provides an opportunity for different sectors to explore interest in collaborative working and new initiatives based on the potential of the East Midlands ancestral tourism market
- To map out what steps would need to be taken to build the case for ancestral tourism in the region and lay the foundations for future investment and partnerships

The information briefing will build on:

- Lessons learnt from Scottish Ancestral Tourism and other similar initiatives and research
- Findings and recommendations of the East Midlands study
- Existing regional networks and projects of relevance

Target audience:

- Archives, museums and libraries in the East Midlands
- Tourist information centre staff, and DMPs and EMT staff
- Historic houses including National Trust
- Family History Societies
- Tourism businesses (within potential network areas)

Outcomes of the day:

- Participants will know about the report and its findings, recommendations and potential opportunities
- Will have a basic grounding in the nature of ancestral tourism and be aware of ancestral tourism initiatives in Scotland and Wales
- Had the opportunity to discuss the relevance of findings to their own situation and had time to consider if they wish to participate in any future work
- The steering group should know which organisations might be interested in future collaborative work in this area, and identified priorities for action and support e.g. Networks, data capture
- The Consultants will review recommendations in light of issues raised, and interest expressed by potential partners and supporters

A draft Agenda for the day is outlined in Appendix Two

2.6 Training and Skills Development

2.6.1 Issues for consideration

One of the key issues in taking this project forward will be to put the necessary building blocks in place to ensure long-term sustainability. Given the relative lack of knowledge within the regional tourism agency, DMPs, the heritage sector and wider tourism trade about the ancestral tourism market and the needs and expectations of ancestral tourists, a comprehensive programme of training and skills development will be required at a number of levels.

Networks: Training and facilitation by ancestral tourism experts to kick start the work of the networks, with information briefings and ancestral tourism training to focus the mind and tease out priorities for the network action plans. Ongoing mentoring and business support is also likely to be required in the early stages of the project;

Coordinator: Tourism/ancestral tourism training, mentoring and ongoing support for the new Development Co-ordinator so that he/she benefits from skills and knowledge transfer and is then better able to in turn this on to network members for longer term sustainability;

Tourism Trade: Training and skills development for the wider tourism trade, to encourage them to recognise the potential of the market and provide them with the tools to ensure they can meet the needs and expectations of ancestral tourists.

Taken together, the three strands of training and skills development activity described below would constitute an integrated approach to this vital area and will help underpin the long-term sustainability of the ancestral tourism initiative in the East Midlands.

2.6.2 Training and Facilitation for the Ancestral Tourism Networks

Training will be required for the ancestral networks, in order to ensure that members are fully aware of the characteristics and profile of ancestral tourists and understand the needs of the market. In addition, it is recommended that a facilitation workshop be held for each network, to kick-start the process of developing the network action plan.

It is anticipated that the training/facilitation requirements for each network can be met via a one-day workshop. It is recommended that this workshop be developed and facilitated by Cameron Taylor. In addition to being one of the project consultants, Cameron developed the Ancestral Tourism Training Course in Scotland and is an accredited Course Trainer there. Additional support may be provided, as required, by Gillian Harrower. Gillian has been involved in ancestral tourism product development in Scotland since 2004.

A suggested outline for the workshop is given below:

- Scene-setting by the Facilitator to help set the context.
- Overview of ancestral tourism, to include background, what motivates ancestral tourists, market profile/characteristics, what's happening elsewhere (comparator projects).
- Group Exercise. SWOT analysis to get participants thinking about the development of ancestral tourism in the area.
- Facilitator-led discussion based on the group work, with the aim of synthesising the feedback into a shared outline vision for ancestral tourism in the area.
- Facilitator-led discussion on the aims and objectives of a network action plan.
- Group work to tease out the priorities for a network action plan.
- Next step – what needs to be done, by whom and when.
- Concluding remarks.

Following the workshop, the Facilitator will produce a bullet-point summary of the workshop discussions, along with an outline of the agreed priorities for inclusion in a network action plan. This summary will then guide the production of a full action plan, the creation of which will be undertaken by the Development Co-ordinator on behalf of each of the networks. We envisage that the post holder would have an active role in the workshop perhaps leading the action planning discussions.

Following the initial training/workshop, it is anticipated that a degree of ongoing mentoring/business support will be required for the networks in the early stages of the project. It is envisaged that this will take the form of attendance at one network meeting, to act in an observer capacity and provide feedback/input as required, plus telephone/email support to the Chair of the network group and Development Co-ordinator on an ongoing basis as required, during the first six months of the project.

In addition, it is envisaged that a further facilitated workshop may be required midway through the project to re-focus aims and objectives and help guide future product development.

Resources Required

Development and delivery of the initial training/workshop session will be carried out by Cameron Taylor. In addition to workshop development/delivery, administrative support will be required in order to source suitable venues, liaise with the Facilitator, co-ordinate logistical arrangements, book catering. It is suggested that the Development Co-ordinator will be best placed to carry out this role in the short term. Cameron Taylor and Gillian Harrower will carry out business support and mentoring requirements for the project. Cameron or Gillian will attend the first meeting of each network group, with Gillian providing ongoing advice and support in relation to product development issues via telephone or email as the project progresses. Where a facilitated workshop is required midway through the project, this will be developed and facilitated by Cameron Taylor/Gillian Harrower.

Workshops

Development/delivery costs for the initial workshop event can be estimated as follows:

- **Workshop development:** £1,200 to develop workshop template (3 days at £400 per day). This will be a one-off cost which will cover development of a workshop tailored to the relevant network area. Thereafter there will be a reduced development cost of £400 per workshop, which will cover tailoring the content to the specific requirements of the other two networks.
- **Workshop delivery:** £1,200 per workshop plus travel and accommodation and subsistence should be estimated at £530 per workshop run, and catering at £150 (£12 per head) assuming a venue could be sourced from one of the public sector partners. Administration would be the responsibility of the Coordinator. Each workshop will last a full day, however in view of distances involved the Trainer will require to stay in the local area the night before and after each workshop. Workshop delivery should therefore be costed at 3 days at £400 per day, for each workshop run – unless some can be run back to back.
- **Total cost:** The total cost for developing and running a workshop in one network area will be £3080. Thereafter the cost will reduce to £2,280 per workshop. Where a follow-up workshop is required midway through the project, development/delivery costs will be £1600.

Business support/mentoring

- Attendance by Cameron/Gillian at the first meeting of a network group will cost £400 plus travelling expenses. It is anticipated that he/she could travel there and back in one day, and travel costs should therefore be estimated at £300.

- The level of ongoing business support/mentoring that will be required by each network is difficult to assess at this stage. However over a six-month period, it can be assumed that this may extend to 3 days in total per network, at £400 per day.
- **Total cost:** The total cost for provision of business support and mentoring services is therefore estimated at £1,900 per network for a six-month period.

2.6.3 Tourism Training, Mentoring and Ongoing Support for the Development Coordinator

It is possible that the Development Co-ordinator will come from the tourism sector, in which case further tourism training may not be required. However it is equally likely that he/she will come from the cultural, educational or heritage sectors and will therefore have limited experience of the tourism industry.

If the latter, we would strongly suggest that an element of tourism training be built in to the induction programme for the new post holder, to involve spending time with a member of staff from East Midlands Tourism and/or the DMPs. We would suggest that one-day would probably be sufficient to provide a basic overview of local and national structures, plus key strategic priorities and activities in the local area.

Whether from the tourism or heritage sectors, it is extremely unlikely that the post holder will have detailed knowledge of the ancestral tourism sector. We would therefore strongly recommend that the post holder spend some time with the project consultants in Scotland, to receive a detailed overview of the ancestral market plus a briefing on the work that has been carried out in Scotland to develop the sector. We would also use this briefing session to raise awareness of some of the issues and challenges which he/she is likely to face in developing ancestral tourism in the East Midlands, and to provide further guidance on the types of product development that might be appropriate for each of the network areas.

We would further suggest it is vital that the Development Co-ordinator attend each of the facilitated training sessions/workshops for the networks, in order to gain a fuller understanding of the issues and priorities of each group. Involvement in the business planning process at this stage will have the added benefit of helping to kick-start the task of developing partnerships and encouraging networking opportunities across the different sectors involved.

We have already suggested in the 'Ancestral Networks' section that a degree of mentoring/business support may be required for the Development Co-ordinator and network Chairs. We would strongly recommend that the Development Co-ordinator take advantage of this facility in the early stages of the project, in order to deal effectively with the issues and challenges which will undoubtedly arise and to ensure that the project continues to move forward in a positive manner, delivering some early successes. Early success will be vital to maintaining the enthusiasm and active input of network members, and will be key to ensuring the long-term sustainability of the project.

Resources Required:

- One day briefing with member of staff from East Midlands Tourism (plus meetings with DMPs as appropriate)
- Two days spent with project consultants Cameron Taylor and Gillian Harrower in Scotland
- Participation in network training sessions/workshops
- Half day per month mentoring/business support from the project consultants

Total cost: The total additional cost for Development Co-ordinator induction and business support will be £2,100. Comprising the following: briefing with East Midlands Tourism/DMPs will be provided at no cost; an induction session with both the project consultants in Scotland will cost £1600 (2 days at £400 per day), plus travel, accommodation and subsistence expenses. These can be estimated at £500. Additional costs for the network training sessions/workshops and mentoring/business support are as outlined above.

2.6.4 Training for the Tourism Trade

Training will be required for the tourism trade to raise the profile of ancestral tourism, encourage operators to recognise the potential of the market and make sure that they are maximising the potential benefits to their business, whilst at the same time meeting the needs of ancestral tourists through the provision of quality services and information.

It is proposed that a series of tailored one-day training courses be developed in each network area, with a maximum of 12 businesses representatives on each course. The target should be to hold one such course in each network area in the first six months of the project, with a further two courses running in each network area by the end of the two year pilot project.

The courses will be run and facilitated by Cameron Taylor/Gillian Harrower, as above.

It is strongly advised that consideration be given to complementing the roll-out of ancestral training for the trade by development of an ancestral quality scheme at regional level, giving businesses the opportunity to demonstrate that they have a basic level of ancestral knowledge and adhere to a code of conduct. Such a scheme has been developed successfully in Scotland and this provides a ready-made model that can be tailored to the particular circumstances of the East Midlands. Developing a code of conduct should not be seen as a prerequisite for promoting and running pilot training courses however.

The training course will be suitable for people in frontline tourism businesses who are likely to come into face-to-face contact with ancestral tourists, such as Tourist Information Centre staff, accommodation establishments, restaurants, pubs and visitor attractions as well as archive and library staff and family history societies. It is also suggested that relevant DMP staff be

encouraged to participate, in order to equip them with a basic knowledge of the ancestral market.

Key objectives of the course will be to equip participants to:

- Understand the particular needs of ancestral tourists
- Be aware of initiatives being taken at local/regional level to address this market
- Be aware of national and local ancestral tourism research resources
- Know how to get further information on aspects of ancestral tourism
- Feel confident about giving accurate information to visitors
- Feel enthusiastic about helping to develop this aspect of tourism

Each ancestral tourism training course will be tailored to the knowledge and requirements of participants, but typical course content is illustrated in Appendix Three.

Resources Required

Given that there are no existing ancestral tourism training courses/providers in England, the course development and delivery will be carried out by Cameron Taylor, an ancestral expert and accredited Ancestral Tourism Course Trainer in Scotland. Additional support will be provided by Gillian Harrower, who has been involved in ancestral tourism product development in Scotland since 2004.

In addition to course development/delivery, administrative support will be required in order to source venues with appropriate IT infrastructure, co-ordinate bookings, handle financial arrangements, book catering and source local guest speakers. It is suggested that the Development Co-ordinator will be best placed to carry out this role in the short term.

Support and active involvement of the relevant DMP will also be required to help promote the course to local businesses through their normal communication channels.

Whilst elements of the course can be lifted from the Scottish model, a significant amount of course development work will be required to tailor the content to an English audience. This will include collating information on national and local resources, as well as compiling handouts on these.

Course development/delivery costs can be estimated as follows:

- **Course development:** £2400 to develop course template (6 days at £400 per day). This will be a one-off cost which will cover development of a course tailored to the relevant pilot network area. Thereafter there will be a reduced development cost of £400 per

course, which will cover tailoring the content to the knowledge and requirements of each group of participants.

- **Course delivery:** £1,200 per course. Each course will last a full day, however in view of distances involved the Trainer will require to stay in the local area the night before and after each course. Course delivery should therefore be costed at 3 days at £400 per day, for each course run. Travel, accommodation and subsistence should be estimated at £530 per course run. Local guest speakers would normally be provided free of charge from Records/Archives Offices or the Family History Society. Administration would be carried out by the Coordinator and promotion at no extra charge through DMPs and Project Board members.
- **Venue/equipment hire/catering:** £450 per course. The chosen venue must have multiple internet access (at least one terminal for every two participants). Venue/equipment hire should be estimated at £300 per course run, although this may reduce if, for example, a suitable public sector venue can be sourced. Catering should be costed at £12 per head.
- **Total cost:** The total cost for developing and running one pilot course in a network area will be £4580 (exc. VAT). Thereafter the cost will reduce to £2,580 (exc. VAT) per course.

2.7 Data capture

Our initial research highlighted that the data held about family historians and ancestral tourists, their profile, motivation, habits, desires and spending patterns was pretty weak. Only archive services hold any consistent information that could be said to fill in part of the picture but their data is not sufficiently sophisticated to be of really use in planning for product development.

Therefore, a basic requirement of the networks will be to establish better data capture and analysis over time so that their action plans can be tailored to the results found and ancestral tourists better served and encouraged by the network's joint activity. A starting point for this will be for all front line organisations to collect the same data, through a simple onsite and online survey, from those who are researching their family history and appear to be from outside the county.

2.7.1 Issues for consideration

Target audience: For use by staff in direct contact with those interested in their family history who are not local residents, especially those visiting East Midlands from other parts of UK and from abroad. Front line staff would include those working in TICs, archives, museums, libraries, family history societies, historic houses etc;

Administration, collation, analysis and dissemination: the Coordinator would be responsible for ensuring that the survey is taken up and implemented not just by the members of the three

Networks who operate public services, but by the same in Leicestershire and Derbyshire so a more comprehensive picture can be established. The coordinator would be responsible for ensuring that all surveys are returned for collation and analysis. The Coordinator would also need to ensure that the DMPs host the online survey on their respective websites for others to link to. The process of collating the data may need to be sub-contracted to a 3rd party with a cost. It would make sense for the coordinator to analysis the results to form a set of overall conclusions and recommendations for the Project Board and a suite of recommendations tailored to each Network;

Timetabling: ideally a ongoing process of surveying should be put in place, which allows for an annual cut off date for data collation and analysis;

Resource requirements: Assuming that each organisation would be prepared to bear the cost of copying, distributing and collecting the surveys, the only really significant cost could be up to about £1,500 per year per Network to cover the additional administrative expenditure of collating the data, assuming that this could not be covered by one of the administrative staff within the Project Board's organisations.

2.7.2 Briefing for Front Line Staff on East Midlands Family History Survey Draft

Ancestral Tourism – It's Everybody's Business

In order to address the issues of consistent data capture, and to build up a better picture of the market, it is recommended that a briefing and survey is issued to all heritage and tourism bodies previously mentioned as having an interest in this area.

An example of the copy for the Briefing, and the survey format is outlined below:

Ancestral tourism, quite simply, is about encouraging people across the world with East Midlands ancestry to visit the region to walk in the footsteps of their ancestors

Increased media focus, including TV shows such as 'Who Do You Think You Are?', have contributed to a huge upsurge in interest in family history, to the point where researching family roots is now the third most popular internet activity worldwide.

As more and more people become interested in researching their family roots, ancestral tourism promises new and exciting year-round commercial opportunities whatever the size and type of your business.

With millions of people across the globe able to lay claim to East Midlands ancestry, the scope and potential of this market in tourism terms is huge.

Why is ancestral tourism so important to the East Midlands?

- Firstly, the market is 'non-competitive' – either you have East Midlands ancestry or you don't!
- Secondly, research indicates that visitors undertaking genealogy activities are likely to spend at least 10% more per day than the average tourist to England.
- Thirdly, ancestral tourists also stay longer than other visitors. The average length of stay of an ancestral tourist is around 10 nights, compared with average trip duration of 4.5 nights for all tourist visits to England.
- It is anticipated that the number of ancestral tourists to East Midlands will increase substantially in future years.
- Ancestral tourists also have a greater propensity to travel outwith the traditional main tourist season, leading to a real opportunity to develop tourism to the East Midlands region in off-peak periods.
- Patterns of emigration from England in previous centuries means that ancestral tourism also offers the potential for good geographic dispersal of visitors throughout the country.
- Given the diverse nature of ancestral resources and attractions on the ground, there is a real opportunity for local communities to benefit.
- Ancestral tourism really is everybody's business! Whether you know it or not, you are very likely to have come across ancestral tourists in the course of your business.
- Researching ancestors tends to be only part of the reason for most ancestral tourists to take a trip to East Midlands, and is only one of many activities they take part in. Indeed, two thirds of ancestral tourists spend less than a quarter of their time researching their ancestors whilst here – which means that they spend a lot of time doing normal 'touristy' things!

What are local agencies doing to capitalise on this market?

Following a regional study into the potential of the ancestral tourism market, tourism and development agencies across the East Midlands, along with colleagues in the Museums, Archives and Libraries sector, are currently exploring the potential for the planned development of ancestral tourism within xxxxxxxx by developing information resources, access, products and services for ancestral tourists. The aim of this activity is to develop a new niche tourism offer for the county/East Midlands to attract more people to the area.

The first step in developing any ancestral tourist market within the East Midlands will be the formation of county-based Ancestral Tourism Networks, or Forums, to take forward product development and marketing at local level, as well as co-ordinate information-sharing, partnerships and networking between different sectors with an interest in the ancestral market.

In order to support these activities, additional capacity and resources are required. MLA have therefore recently put in a bid to Renaissance East Midlands for an Ancestral Tourism Coordinator to take on this work. The outcome should be known by March 2009.

How can you help?

The recent study identified that ancestral tourism in the East Midlands is currently taking place 'under the radar', and that whilst there is anecdotal evidence of demand, there is a relative dearth of hard statistical information on which to base decisions and justify investment of resources.

The agencies involved are therefore keen to try and build up a more solid picture of current ancestral tourism activity, in order to drive future development activities.

One way of doing this is to capture data from family history researchers and ancestral tourists at outlets across the region. These outlets include Tourist Information Centres, County Records Offices, Archives, Museums, Libraries and key heritage attractions.

To aid this process, a simple data capture template has been produced which asks visitors to tell us a bit more about their family history quest. The information from this data capture exercise will be collated centrally by the Ancestral Tourism Networks and will be used to inform future ancestral tourism product development and marketing activity.

What are we asking you to do?

Front line staff

When you receive a family history-related enquiry, please ask the enquirer if they mind providing a little more information about their family history search by answering a few simple questions. Everybody who completes the form will be entered into a draw to win a great prize!

As you ask them the questions, please note down their responses on the data capture form. Once you have a good quantity of completed forms, you will be asked to send them to a central point where they will be analysed and the results shared with participating outlets.

Web/E mail enquiries

The survey will be posted on your local tourism website, www.xxxxxxxx. When you receive a family history-related enquiry, please include the link to the online version of the survey in your reply, with a request that the enquirer spend a few moments of their time sharing information on their family history search. By filling in and submitting the survey online, enquirers will automatically be entered into the free prize draw. ENDS

The Survey Draft is detailed in Appendix Four.

2.8 East Midlands Trade Support information - Checklist

Whilst the needs of family historians are fairly well understood beyond archives, even if only anecdotally in the East Midlands, the distinct needs of ancestral tourists, in terms of a personal package, are not. What anecdotal understanding does exist has not traditionally been shared well amongst the different parts of the heritage sector, and certainly not with the wider tourism trade.

Any ancestral tourism that is currently happening across the region, is also taking place without any support from tourism or development agencies. Whilst many tourism operators are aware that interest in family history research is on the rise, the wider tourism trade has a general lack of understanding and knowledge of the ancestral market, their potential role in it, and the possible business benefits of being involved in this market.

There is therefore a pressing need to raise industry awareness of ancestral tourism opportunities and place ancestral tourism 'above the radar' of perception. A key part of this process will be to help the tourism trade understand that ancestral tourism is everybody's business, and whether they know it or not, all tourism operators are very likely to have come across ancestral tourists in the course of running their business.

A second priority must be to help the wider tourism trade to understand that ancestral tourists have very specific needs and desires, and that they are looking for a certain kind of warm welcome, traditional reception, enthusiasm and knowledge from the people they encounter on their very personal journey.

We would therefore recommend production of an ancestral tourism 'Checklist' for tourism businesses, highlighting the characteristics of this growing market, outlining a range of tips for tailoring their business offering to ancestral tourists, and providing them with 'exemplar case studies' to stimulate action.

2.8.1 Issues for Consideration

Format of checklist: We would recommend that the checklist be produced in the form of a 'Q and A' leaflet, and that the leaflet be made available electronically as a 4pp pdf file, in both high and low resolutions, in the first instance, so that it can be posted onto trade/corporate websites or emailed to businesses 'en masse' or on an individual basis as required;

Distribution: Distribution channels should include establishments and organisations likely to come into direct contact with ancestral tourists, including TICs, front line tourism businesses (in

particular accommodation and heritage-type visitor attractions), County Records Offices, Libraries, Museums, Archives. To raise awareness of the ancestral tourism market amongst tourism support staff, it is also recommended that the leaflet be distributed to business engagement staff at tourism organisations across the region, as well as DMPs and development agencies.

Resources required

There are two production options which could be considered:

The proposed Development Co-ordinator takes on the task of producing the leaflet. By utilising the Project Manager resource, no further staffing costs are incurred.

A Consultant is commissioned to produce the leaflet. As a template for a similar leaflet already exists, it would be a relatively easy task for the project consultants to adapt this for use by businesses across the East Midlands. However it should be noted that some additional research would be involved in sourcing suitable exemplar case studies.

As a rough guide, it should be assumed that around 7 days of work would be required for production of the leaflet (this does not include design work, or time required for checking/proofing by relevant bodies). Whilst Option 1 would not incur any additional staffing costs, Option 2 would incur consultancy costs of around £2,800 (exc. VAT), assuming consultancy fees of £400 per day.

In addition, the following costs are estimated:

Design	£1,000
Typesetting	£500
Production of pdfs	£150
Distribution	Can be carried out at no cost if distributed electronically

Total cost: Option 1 - £1,650 Option 2 - £4,450 (both exc.VAT)

Funding: We understand that DMPs regularly undertake design and branding activity on behalf of partnership projects and so we assume that the design, typesetting and PDF production costs have been absorbed by them.

2.8.2 Draft Content for Checklist for Tourism Businesses

A Suggested 'Q&A' content for the guide is outlined below:

- Introduction/personal message from a senior figure within the regional tourism industry. (This is desirable in order to encourage 'ownership' of the leaflet by the local trade)
- Why is ancestral tourism so important to the East Midlands?
- Why should you be involved in this market?
- What does a typical ancestral tourist look like?
- What motivates them?
- What is the ancestral tourist looking for from you?
- How can you provide a better service for ancestral tourists?
- Ideas In Action – a range of case studies designed to inspire and stimulate action

2.9 Volunteer development

We envisage any volunteer development programme happening on a county basis, with a view to any programme of activity forming part of the action plan of one of the networks and therefore reflecting local priorities and circumstance. Our rationale for this stems from the fact that the idea grew from Steering Group rather than our initial research discussions with heritage and tourism organisations. We have floated the notion of a volunteer programme with the potential Network members but, as yet, no clearly articulated project proposals have been expressed by them that they would like to see considered as part of action plans, although this is not surprising as would need to grow from Network members discussions at a later date. We have, therefore, decided to lay out some potential issues for consideration by the Networks when they emerge.

2.9.1 Issues for consideration

The scope and theme: There are various different kinds of projects which would be of value to developing ancestral tourism in the East Midlands. The following are some suggestions:

Underpinning work: This could take form of volunteers engaged with archival collections in archives, museums, libraries and historic houses that require proper cataloguing and indexing for names, occupations etc before being made available to support family history e.g. Northampton Museum's Shoe Makers index. The work of National Trust in partnership with The

National Archives to make Southwell workhouse records accessible could act as a model;

Developing Better Signposting: This could take form of programme to transfer knowledge from local and family historian volunteers to front line staff in museums, TICs, accommodation providers, historic houses and sites, where ancestral tourists can turn up. This programme could involve volunteers in a training role themselves, developing roll out to other organisation's staff, copyrighting for leaflets and writing FAQs etc;

Extending skills: There seems to be an issue about succession planning for Blue Badge Guides that has been raised as a concern by more than one DMP. There may be scope for providing a programme of knowledge and skills transfer from the existing Guides in the East Midlands through the volunteer network of family and local historians, with a view to encouraging a small number through the Blue Badge training and accreditation process and encouraging others to 'round off' their knowledge so that there is a larger pool of volunteers with both local and family history knowledge in each county;

Comparator projects: It may be helpful to discuss plans with:

Living Links: A community archive project in Hampshire and Isle of Wight, with clear training structure for ambassadors and community heritage organisations managed by a Community Archive Development officer. Contact: Sarah Spellar, Project Officer, Tel: 01962 846154 or email: sarah.spellar@hants.gov.uk;

Archives of Great Expectations: A volunteer programme led and managed by Friends of Medway Archives for cataloguing records of City of Rochester and further activities with schools, other local authority depts involved in wider heritage regeneration and universities. Contact: Mrs Tessa Towner, Chairman of Friends of Medway Archives, Tel: 01634 722959 or email: picketwitch@blueyonder.co.uk.

The Steering group indicated that any volunteer programme could be submitted as an application for funding to the Heritage Lottery Fund (HLF), so it may be helpful to point out some key considerations from an HLF perspective:

- There is a specific guidance note on volunteering to help applicants which is available to download at:
<http://www.hlf.org.uk/English/PublicationsAndInfo/AccessingPublications/Helping+your+application.htm>
- There is also a specific guidance note on Archives, People and Communities which will be of value:
<http://www.hlf.org.uk/English/PublicationsAndInfo/AccessingPublications/Helping+your+application.htm>
- Volunteering can support one of the key aims which applicants to the Your Heritage and Heritage Grants *must* meet: that of learning and can support the other key aim of participation which most applicants aim to meet but which is not obligatory;

- Learning and volunteers: HLF tends to see this as about the acquisition of new or extended *knowledge and skills* by volunteers during the course of a project that will have lasting benefit to the individuals, not just in terms of heritage specific skills, such as cataloguing, but general life skills gained at the same time in course of an archival project such as better written skills. HLF also looks to see whether a project is cascading skills from paid staff or expert volunteers to new recruits or previously less skilled volunteers.
- Participation and volunteers: HLF is interested not just in the increasing the volume of new volunteers taking part in a project but the quality of the opportunities that are offered. As a consequence, HLF will look to see that volunteers are not just involved in low level activities, such as transcription, providing information to the public, manning events, but have a role in shaping the project, managing it and making decisions about its scope, direction and delivery. This extends to making most of volunteer skills in such areas as business planning, fundraising and IT. As a consequence, HLF is keen to see some input of volunteers on Steering Groups, management boards and in shaping the project etc;
- Seeking HLF advice: At the point where any project is starting to form, and certainly before submitting any application, it should be discussed with HLF's development team in the East Midlands. At present the Acting Development Manager at HLF East Midlands is Linda Stone: email lindas@hlf.org.uk or call 0115 9349050.
- It is always worth remembering that HLF counts the time given by volunteers as a non-cash or 'in-kind' contribution to the costs of the project (which can help to lower the amount of cash partnership funding required to meet HLF requirements). Unskilled labour can be charged at £50 per day (this might included manning an event): skilled labour at £150 per day (this might cover tasks such as indexing, transcribing, cataloguing, oral history interviewing, providing expert family history advice, guiding) and professional tasks at £350 per day (this might cover blue badge guide devising learning programme for other potential tour guides).

2.10 Literary Tourism: Evaluation of Tennyson 2009 and DH Lawrence Festival 2009

We recommended that an evaluation is set in train to assess the value of the process of developing and delivering Tennyson 2009 and the tourism impact of visitors. This can then act as a starting point for coordinated activity and sound product development.

2.10.1 Issues for Consideration

Scope: We have already highlighted the fact that the evaluation should assess both visitor impact and the delivery mechanisms. From further discussions with partners, we believe it would be of more value to compare and contrast the approaches used by Tennyson 2009 and DH Lawrence Festival 2009;

Management: MLA should consider whether to establish a separate Steering Group for this work (to ensure it receives sufficient attention) or to incorporate literary tourism within the scope of the Ancestral Tourism Project Board;

Timetable: the programme of evaluation needs to be in place by end of May 2009 to fit with the majority of events and visitor flow in Summer 2009;

Resources required: We estimate that the evaluation would require funding of approximately £12,000 to cover the costs of employing a consultant(s) at a day rate of between £350 and £400 for a maximum of 30 days.

Funding: MLA has indicated that it may be able to find £6,000 to part fund the evaluation and is in negotiation with Lincolnshire Tourism and Lincolnshire County Council to provide the match funding.

2.10.2 Draft Brief for Evaluation

Proposal

MLA is looking to commission a consultant(s) to evaluate and report on two literary tourism initiatives in the East Midlands with a view to establishing a clearer picture of the value of literary tourism to the visitor economy of the region and the most effective means of delivering it.

Background

In October 2008 MLA East Midlands commissioned a study from Cultural Consulting Network and Seabridge Consultants to assess the potential for ancestral and literary tourism in the East Midlands. This study was overseen by a Project Board, which was comprised of MLA East Midlands, Lincolnshire Tourism, Lincolnshire Museum Development Officer and County Archive Service for Northamptonshire. The study found that literary tourism initiatives, centred on figures such as DH Lawrence and Byron in Nottinghamshire, and Tennyson in Lincolnshire was happening without any real evaluation of the programme themselves and the impact upon visitors to the East Midlands. Consequently it is difficult to estimate the potential market for programmes of activity based on literary figures to boost the visitor economy of the region.

The full report of the study can be found at: xxxx

Tennyson 2009

2009 is the 200th anniversary of the birth of Tennyson in Somersby, in the Lincolnshire wolds. The Tennyson 2009 anniversary programme is being led by the Tennyson Resource Centre, in partnership with Lincoln Cathedral, University of Lincoln, the Tennyson Society, Lincolnshire Tourism and the respective City and County Councils. The programme of events includes a

major exhibition, tours, trails, an academic conference and a poetry competition. For further information on Tennyson 2009, please see <http://microsites.lincolnshire.gov.uk/Tennyson/>

DH Lawrence Festival

The DH Lawrence Birthplace Museum, along with the Durban House Heritage Centre (housed in the building in which DH Lawrence's father collected his wages) form the cornerstones of the blue line trail developed by Broxtowe Borough Council, which takes in a series of buildings closely linked to Lawrence's life and output all within the village, most of which are in private ownership. The sites complement each other, the Birthplace Museum offering a chance to tread into the same space as the author '*as though the family had just gone out for the afternoon*' while the Heritage Centre provides more context to the author's life and houses temporary exhibitions. The sites underpin the DH Lawrence festival, also organised by the local council annually since 2004, providing a kind of solid ground of permanent displays, temporary exhibitions and staff knowledge on which to hang other kinds of activity to draw in visitors, such as cookery courses from countries which Lawrence visited. For an example of a programme for DH Lawrence Festival see <http://www.nottinghamonline.com/Nottingham-Information/DH%20Lawrence/DH%20Lawrence.htm>

The University's special collections department hold an outstanding archive of Lawrence material which forms the core resources of its DH Lawrence Research Centre which has its own microsite. <http://www.dh-lawrence.org.uk/east-midlands.html>. In 2007, the University held a major academic conference on Lawrence which attracted attendees from all over the world.

Project Purpose and Aims

- To assess the impact of Tennyson 2009 and DH Lawrence Festival in 2009 on the visitor economies of Nottinghamshire and Lincolnshire respectively;
- To assess the project management, organisation, partnerships, business planning, resource allocation and fundraising of the two initiatives and to compare and contrast their approaches and visitor offer;
- To extrapolate from the above, to determine what are the critical success factors in developing literary tourism in terms of the needs of the market and the programme organisation;
- To help position organisations with a role in literary tourism to understand better the kind of product development that literary tourists are interested in.

Target audiences for report

- Tourism bodies e.g. DMPs in East Midlands, East Midlands Tourism, Visit Britain
- Heritage organisations: MLA, English Heritage, National Trust
- Partners that deliver literary tourism: archives, museums, libraries, heritage sites, Blue Badge Guides, county council marketing departments
- Cultural partners: Arts Council East Midlands, Writing East Midlands

Project Scope and Methodology

The evaluation will concentrate on two distinct areas of work for both Tennyson and DH Lawrence, which are 1) visitor impact 2) project organisation.

Visitor impact

- A method for capturing key data from visitors to events and sites during the programmes will need to be developed and implemented. The main period of events for Tennyson 2009 is from June to September, and for DH Lawrence Festival from August to September. The data capture should assess: profile, place of origin, whether they have been on other literary breaks, places visited in East Midlands, length of stay, type of accommodation, other tourism activities, what factors would influence further literary tourism;
- The consultant(s) will be responsible for collating the data and analysing it;
- The methodology will need to take account of the DMP's evaluation model for determining return on investment, existing planned evaluation for Tennyson Research Centre summer exhibition plus visitor impact of Tennyson Trail evaluation conducted by Lincolnshire Tourism (out of ERDF and not within framework of main evaluation programme of Lincolnshire Tourism)

Project Organisation

- Interviews will need to be held with the key delivery partners (see below) for each initiative, to establish what project management, resources, organisation and delivery they have contributed and the effectiveness of it. These interviews should take place once the bulk of activity is complete between September and January so that views can be sought on the effectiveness of the initiative from contributing partners

Key Organisations to involved and consulted

For Tennyson 2009

Tennyson Research Centre

Tennyson Society

Lincolnshire Tourism

University of Lincoln

Lincolnshire County Council Marketing Department

Lincolnshire Blue Badge Guides

Lincoln: The Collection

East Lindsey District Council

For DH Lawrence Festival

Broxtowe Borough Council

Durban House Heritage Centre, Eastwood

DH Lawrence Birthplace Museum, Eastwood

University of Nottingham: Department of Manuscripts and Special Collections

University of Nottingham: DH Lawrence Research Centre

University of Nottingham; Marketing Department

Experience Nottinghamshire

Reporting Structure and timescale

The consultant(s) will be managed on a day to day basis by xxx of MLA and it is anticipated that there will be 3 meetings of the Steering Group during the contract period. Consultants would need to be appointed by end April 2009 and expected to have completed the work by end February 2010.

The proposed outputs, timescales and suggestions for wording for the tender and selection criteria are given in Appendix Five.

3. Summary of Resources and Funding Required

Programme Activity	Funding Required	Sources of Funding
Information Briefing Day	About £600	To be met by MLA from internal budget
Project Board	Up to £5000 over 2 years for meetings	Subsidised by budgets of member organisations
Ancestral Tourism Development Coordinator	Salary: £35000-£40000k per annum. The funding required would be £100000 (£40000 x 2 plus on costs of 22% plus inflation uplift of 2% in second year) plus: Recruitment: £1500 one off costs Travel: £5000 over 2 years Office: £10000 over 2 years Training (covered at 2.6.3): £2100 Total: £118600	£90000 from MLA through Renaissance funding for 2009-11 (not secured). Assumed that employing body would bear office costs
Ancestral Tourism Networks	Up to £15000 over 2 years for meetings (£5000 for each 3 networks)	Subsidised by budgets of member organisations
Ancestral Tourism Action Plans (costs include assumed costed elements 1-4 below:	£60000 - £75000 over 2 years (£10000 - £12500 per network per year), in which are included costs of elements 1-4 below plus additional marketing if coordinator carried out much of copywriting-	Possible £10000 from Northants CC for action plan and £2000 from Northants FHS for guide
1. Online Guides and Web Promotion	£5475 or £21075 (Option 1 £1,825 written by Coordinator, Option 2 £7,025 by consultant, Option 3 £1,825 by network member per network) £3000 or £10200 (Option 1 £1000 written by coordinator, Option 2 £3400 by consultant per DMP)	
2. Training and Facilitation for Ancestral Networks	£19,740 (£3080 for first workshop for each network in year 1 plus £1600 for assumed follow up workshop in year 2 for each network plus £1900 for business support and mentoring over 6 month period per network)	

and Training for Tourism Trade	£9740 (£4580 for first workshop later 2 £2580)	
3. Data Capture and Analysis	£9000 over 2 years which assumes that collation of data needs 3rd party handling + analysis conducted by coordinator (£1500 per network per year).	Slim possibility that data collation could be undertaken by DMPs
4. Trade Support Information	£4950 or £13350 (£1650 or £4450 depending on whether text written by coordinator or by consultants)	Assumed that the 3 DMPs would absorb costs of in house design of £4950
Volunteer Programme	To be determined	To be determined
Literary Tourism Evaluation	Consultants: £12000 over 1 year (2009-10)	Identified funding of £6000 from MLA trying to match with funds from Lincs Tourism and Lincs CC
Total funding required	Up to £211200 - 226200	
Total funding (identified but not secured)		£108000
Total funding in addition (assumed as contribution from member organisations for Project Board and network meetings)		£35550
Funding shortfall (unidentified)		£67650 - £82650

4. Conclusions and next steps

During the development of these recommendations we have made, what we consider to be, important progress in generating interest from potential partners. We have been impressed with the level of enthusiasm from both the heritage and tourism agencies for some coordinated activity to really work out what efforts should be going into improving the quality of ancestral and literary tourism in the East Midlands.

Assuming that our recommendations are implemented, we felt it was worth highlighting what we would consider to be evidence of the success overtime. We are conscious that this report concentrates on a developing a series of actions and outputs and we wanted to underline what kind of outcomes might be achieved. We think success would be:

- local networks are sustainable in the medium to long term, generating and implementing new ideas
- local pressure grows for additional networks
- interested parties have a better market understanding and there is ongoing analysis of that market in place
- new commercial ancestral and literary tourism products and services begin to be developed
- customer feedback, including web site user numbers, demonstrates that there is an active ancestral and literary tourism market
- the ancestral tourism co-ordinator has a high and positive profile amongst stakeholder groups

To plot a course towards that success, it remains our view that real commitment to the Project Board and the establishment of the Coordinator post are essential prerequisites to any other action.

We consider the key next steps in taking this work forward over the next 6 months are:

1. For the Project Board to be established, which will involve the Steering Group reviewing their joint and individual commitment over a medium term period of 3-5 years, securing the interest of East Midlands Tourism, and agreeing terms of reference;
2. For one of the Project Board to be the lead champion in maintaining momentum, securing funding and driving the project forward until a Coordinator is established;
3. Each Project Board member will need to take responsibility for generating buy in from their own organisation and networks they represent;
4. Identifying a regional champion or leader for the project, which could involve someone outside of the Project Board with influence;
5. Each partner organisation on the Project Board and the organisations they represent needs to be formally asked whether they can make a financial contribution to the project, or whether they can provide in kind support.
6. Once the above is established, the Project Board should review its priorities and start the recruitment process for the Coordinator which could take 3 months;
7. The process for creating a secure Project Board can run alongside signing up potential network members after the Information Briefing day on the 23rd February. There may need to be tacit agreement from individuals rather than organisations in the first instance;
8. Once the Coordinator is in post, he/she can begin to formalise the establishment of the Networks. Once there are in place, the action planning process can begin via the facilitated workshops suggested.

Report prepared by:



CULTURAL CONSULTING NETWORK

Katie Norgrove

Sophia Mirchandani

In collaboration with

SEABRIDGE CONSULTING

Cameron Taylor

Gillian Harrower

Appendix 1

Table of Details for Potential Ancestral Tourism Networks for Lincolnshire, Northamptonshire and Nottinghamshire

Lincolnshire

Potential Network Member	Representing	Represented by	Contact Details	Organisational aims for Network	Resources to offer
Lincolnshire Museums Development Officer	Museums	Hannah Gould	hgould@leics.gov.uk	<p>Hannah supports all the smaller museums in Lincs (i.e. those not directly supported by Lincolnshire county Council) and would be interested to explore how museums in the county could develop this work and develop links with tourism providers and businesses. As a member of the project board she is very interested in developing this project further.</p> <p>Top priorities for Hannah would be getting to know other providers and developing a better understanding of the museums in her network might work together more effectively with smaller museums in the county. The Network will also be useful in helping to raise awareness of</p>	<p>Skills and experience include experience of providing advice and support to museums, developing and leading networks, in depth knowledge of museums in the county plus links to the wider MDO network in the region and Renaissance East Midlands and other areas of Renaissance activity and partnership working in the county and region.</p> <p>Hannah also coordinates the Lincolnshire Heritage Forum - a shared voice for museums and heritage sites in the county. LHF has a joint leaflet which could be shared and a website is currently under development. There could be possibilities for links to be made between the two groups/networks.</p>

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				museums in the county generally and what they have to offer	Any joint ancestral leaflet could go on the Lincs Heritage Forum website once developed. There are no real restrictions on joint marketing but it would be up to individual museums to elect to be part of any campaign.
Lincolnshire Archives	Archives	Stephanie Gilluly	Stephanie.gilluly@lincolnshire.gov.uk	<p>Stephanie contributed to the initial report and has been sent the Exec Summary and associated papers, plus an invite to the Info Briefing Day. As yet we have been unable to contact her by telephone to ascertain her interest in participating in the Lincs Network (no reply w/c 5th Jan)</p> <p>It is understood that Stephanie may now have a wider remit than archives, however it is felt that she will still be the best person to advise on an appropriate representative from the this sector.</p> <p>Further attempts have been made to contact Stephanie w/c 12th January.</p>	
National Trust	National Trust/Historic	David Fitzer	david.fitzer@nationaltrust.org.uk	David Fitzer and National Trust Regional Marketing Manager	After showing initial enthusiasm, David has come back to say that

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	Houses		k	Steve LeMottee were sent the Exec Summary and associated papers, plus an invite to the Info Briefing Day.	<p>whilst he thinks the project is a worthwhile one, he does not have the capacity to get involved in any additional projects at the current time.</p> <p>I have suggested that he (or a colleague) attends the Info Briefing Day, in order to keep the Trust in the communications loop.</p>
Lincolnshire Tourism	Tourism DMP	Penny Baker	penny@lincolnhiretourism.com	<p>Penny would be keen to see an Ancestral Tourism Network developed, in order to instigate partnership working and enhanced communication between relevant agencies on a county-wide basis.</p> <p>She is also keen to make tourism businesses in the area aware of the potential of the ancestral market, and to ensure that businesses are equipped to maximise the potential business benefits form this sector.</p> <p>Penny will be the Lincolnshire Tourism representative on the Network Group in the first</p>	<p>Penny is the CE of Lincolnshire Tourism and a member of the project Steering Group.</p> <p>Lincolnshire Tourism is the DMP for Lincolnshire, and as such offers a marketing route to potential ancestral tourists through its consumer-facing website, as well as a potential 'intranet' facility for businesses/organisations though its DMP system.</p> <p>It is unlikely that Lincolnshire Tourism could make a contribution to the core operational costs of the project, however they may be able to allocate funds to specific marketing initiatives.</p>

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				instance.	<p>They would be keen to see an ancestral section developed on their consumer-facing website, and would have no problem with making an ancestral guide available through this channel.</p> <p>The DMP would provide a key route to tourism businesses across the area, and could carry project updates and messages through its various trade communication channels.</p> <p>Penny is keen to see private sector tourism representation on the Network, and made a number of suggestions as to people who would be worth speaking to. It was agreed that Lincolnshire Tourism should make the initial approach to these contacts.</p>
Blue Badge Guides	Tourism sector	Jean Howard	jrbh@btinternet.com , Tel. 01507 604717	Jean has been suggested as somebody who might well be interested in this project. She has connections with Louth Museum and also has a strong interest in Tennyson.	I am following up the initial contact from Lincolnshire Tourism by sending her more background info on the proposed aims and objectives of the Network Group.

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				Penny's PA has sent her the report Exec Summary and an invite to the Info Briefing Day.	
Blue Badge Guides	Tourism sector	Jill Collinge	Jillcollinge2002@hotmail.com , Tel. 01780 410780	Jill has been suggested as somebody who might well be interested in this project. Penny's PA has sent her the report Exec Summary and an invite to the Info Briefing Day.	I am following up the initial contact from Lincolnshire Tourism by sending her more background info on the proposed aims and objectives of the Network Group.
Tourism Consultant/Blue Badge Guide	Tourism sector	Kari Moss Wright	karimosswright@btinternet.com , Tel. 07769 705704	Kari has been suggested as somebody who might well be interested in this project. She wears two hats – as a Tourism Consultant and a Blue Badge Guide. Penny's PA has sent her the report Exec Summary and an invite to the Info Briefing Day.	I am following up the initial contact from Lincolnshire Tourism by sending her more background info on the proposed aims and objectives of the Network Group.
Newport Guest House	Tourism accommodation sector	Mike Clark	info@newportguesthouse.co.uk , Tel. 01522 528590	Mike has been suggested by Penny Baker as somebody who might represent the accommodation sector. Newport is a three star Victorian Guest House situated in Lincoln. The website suggests the owners have a strong interest in history and heritage. Somewhat uniquely,	I have followed up the initial contact from Lincolnshire Tourism by sending Mike more background info on the proposed aims and objectives of the Network Group. He has responded to say he is keen, but may have a problem making the event on 23 rd Feb. I have advised that if he is unable to

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				<p>Newport Guest House is also home to a display of original frescoes created for the filming of the Da Vinci code in 2005.</p> <p>Visitors are offered free broadband internet access, something which will be attractive to potential ancestral tourists.</p> <p>Penny's PA has sent him the report Exec Summary and an invite to the Info Briefing Day.</p>	<p>attend, somebody will brief him afterwards.</p>
The White Hart Hotel	Tourism accommodation sector	Bryan Williams	<p>bryan.Williams@whitehart-lincoln.co.uk, Tel. 01522563297</p>	<p>Bryan has also been suggested by Penny Baker as somebody who might represent the accommodation sector.</p> <p>The White Hart Hotel is a three star boutique hotel situated in the historic centre of Lincoln, and renowned as one of the best in the area. The hotel has its origins in the 14th century.</p> <p>The hotel's website suggests a strong interest in the history and heritage of the area.</p>	<p>I am following up the initial contact from Lincolnshire Tourism by sending Bryan more background info on the proposed aims and objectives of the Network Group.</p> <p>Bryan has responded to say he is unable to make the 23rd Feb event as he will be on Honeymoon.</p>

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				Penny's PA has sent her the report Exec Summary and an invite to the Info Briefing Day.	
Lincoln Tourist Information Centre	Tourist Information Centres	Paula Colburn.	paula.colburn@lincoln.gov.uk	<p>Paula was contacted during the initial research phase and provided some useful statistics on ancestral enquiries through the TIC.</p> <p>She has been sent the Exec Summary and associated papers, plus an invite to the Info Briefing Day. No feedback has been received to date and she has not returned my phone calls.</p>	<p>Penny Baker has advised that Lincolnshire TICs are undergoing a review, and staff have therefore been instructed not to get involved in any new initiatives at the current time.</p> <p>Her advice is that whilst we should keep Paula in the communication loop, it is not worth chasing her with regard to representation on the Network. She also feels it is unlikely that any TIC staff will be able to attend the Info Briefing Day, although they will receive an invite.</p>
Lincolnshire Tourism	Tourism DMP	Keren Shepherd	keren@lincolns-hiretourism.com	I spoke to Keren at the suggestion of Penny Baker, and subsequently sent the report Exec Summary and Associated papers.	Keren is Lincolnshire Tourism's Travel Trade Manager. She advises that whilst ancestral tourism is not one of their current priorities, they are in touch with a number of special interest groups having a particular interest in heritage and culture, which may include ancestral. She further advised that much of their marketing is done to North American markets which are likely to have a strong interest in

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					<p>ancestral tourism.</p> <p>She was interested to hear about the proposed trade publication and development of a Network group to drive product development forward.</p> <p>From what she was saying, it is clear that this project could have synergies with Keren's travel trade activities and it would certainly be worth keeping her in touch with the project as it progresses.</p> <p>She has agreed to come back with additional feedback and a list of suggested contacts to follow up once she has had a chance to read through the report Exec Summary and recommendations.</p>
North Kesteven Council	Economic Development – Local Authority	Sally Porter	sally_porter@n-kesteven.gov.uk	<p>Sally was suggested by Hannah Gould as somebody who would have a keen interest in the project. She has been sent the report Exec Summary and associated papers, plus the invite to the Info Briefing Day.</p> <p>She has since indicated she will be attending on 23rd February in</p>	<p>Sally is the Economic Development Project Officer for North Kesteven Council, and as such has a keen interest in developing tourism in the area.</p>

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				order to find out more about the proposed Networks.	
Lincolnshire County Council	Archives, Museums and Libraries	Will Mason	william.mason@lincolnshire.gov.uk	Will was suggested by Hannah Gould as somebody who would have a keen interest in the project. He has been sent the Exec Summary of the report and associated papers, plus the invite to the Info Briefing Day. No feedback has been received to date	Will is responsible for the marketing of Archives, Museums and Libraries in Lincolnshire.
North Kesteven Council	Tourism – Local Authority	Denise Spearman	denise_spearman@n-kesteven.gov.uk	Denise was suggested by Hannah Gould as somebody who would have a keen interest in the project. She has been sent the report Exec Summary and associated papers, plus the invite to the Info Briefing Day. No feedback has been received to date.	Denise is the Venue and Tourism Manager for North Kesteven District Council.
East Lindsey District Council	Economic Development – Local Authority	Karen East	karen.east@e-lindsey.gov.uk	Karen was suggested by Hannah Gould as somebody who would have a keen interest in the project. She has been sent the report Exec Summary and associated papers, plus the invite	Karen is the Economic Development Officer for East Lindsey District Council.

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				<p>to the Info Briefing Day.</p> <p>No feedback has been received to date.</p>	
Heritage Lincolnshire	Heritage sector	Dave Start	info@lincsheritage.org	<p>Dave has been sent the report Exec Summary and associated papers, plus the invite to the Info Briefing Day, in order to make him aware of the project and to gauge interest in being further involved.</p> <p>No feedback has been received to date.</p>	Dave is the Director of Lincolnshire Heritage, which aims to protect, preserve, promote and present the heritage of the county.
Lincolnshire Family History Society	Family History Society	Hazel Deighton	chairman@lincshshirefhs.org.uk	<p>Hazel has been sent the report Exec Summary and associated papers, plus the invite to the Info Briefing Day, in order to make her aware of the project and to gauge interest in being further involved.</p> <p>No feedback has been received to date.</p> <p>Unfortunately it has not been possible to speak to Hazel by phone, as the only number given on the website is for the Research Centre in Lincoln, which is only</p>	Hazel is the Chair of Lincolnshire Family History Society, which has 8 branches throughout the County. Each branch holds monthly meetings with speakers on a range of family/local history topics. The Society has 3.500 members worldwide. Administration and enquiries are dealt with by volunteers at the Research Centre in Lincoln, although it should be noted that this Centre is only open on a very part-time basis.

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				<p>open for three hours, two days per week (Sun & Mon). The Centre is run by volunteers.</p> <p>I am hoping that Stephanie Gilluly of Lincolnshire Archives may be able to provide further guidance on the best way of engaging Lincolnshire FHS in the wider project.</p>	
Society for Lincolnshire History and Archaeology	Heritage sector	Pearl Wheatley	slha@lincolnshirepast.org.uk	<p>Pearl was suggested by Hannah Gould as somebody who would have a keen interest in the project. She has been sent the report Exec Summary and associated papers, plus the invite to the Info Briefing Day.</p> <p>Penny Baker advises that Pearl is also a Blue Badge Guide.</p>	Pearl has responded to say she will raise the matter at a meeting of the Local History Team, due to take place before the end of January.

Northamptonshire

Potential Network Member	Representing	Represented by	Contact Details	Organisational aims for Network	Resources to offer
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Northamptonshire Enterprises	DMP	David Randell, Chief Executive Kate Dent Head of Sales and Marketing	David.Randall@northamptonshireenterprise.ltd.uk 01604 609 537 Kate.Dent@northamptonshireenterprise.ltd.uk 01604 609531	<ol style="list-style-type: none"> 1. Build on county heritage strengths and communicating that county is place to stay for more than a day 2. Boost US and UK visitors of George Washington 3. Link with Blue Badge Guides 4. Allow for tailor made solutions for each Network and no prescription 	<ol style="list-style-type: none"> 1. manage TICs directly so would be responsible for their engagement in network 2. Offered in kind support of branding and design for online publications and web presence 3. 1-2 days per month capacity 4. No commitment in terms of hosting or funding coordinator and additional marketing (budget for marketing is £75k per annum).
Northamptonshire Record Office	County Record Office and archives	Sarah Bridges County Archivist and Heritage Services Manager	SBridges@northamptonshire.gov.uk 01604 762129	<ol style="list-style-type: none"> 1. increasing use of record office and supporting cataloguing 2. supporting local economy via tourism 3. maximising links with forthcoming County Council Heritage and Promotion programme 'Let Yourself Grow'. 4. building links with Northamptonshire Enterprise Ltd which already started via £10k educational timeline resource. 	<ol style="list-style-type: none"> 1. Possible funding of up to £10k to support coordinator as part of wider package of funding from County Council for County Heritage and Promotion theme in 2009-11 2. Accommodation and would consider hosting coordinator (currently do same for MDO). 3. Significant estate collections 4. Guide to family estate collections and expert member of staff, guide to house history
Northampton Museum	Museums	Rebecca Shawcross, Curator Boot and Shoe Collection or Jerry Weber, Collections	rshawcross@northampton.gov.uk 01604 837281 jweber@northampton.gov.uk	<ol style="list-style-type: none"> 1. managing existing level of family history enquiries 2. using network as means to contribute to County Council Heritage and Promotion 3. supporting local economy via 	<ol style="list-style-type: none"> 1. Significant index to shoe industry collections covering 1000s names generates 20% of all enquiries 2. shoe industry expertise 3. applying for National status and development of specialist subject

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		Manage	mpton.gov.uk 01604 837633	tourism 4. signposting other resources	network for footwear from MLA 4. cannot offer any funding or even free meeting space at present as council overspent. Might ease in later in 2009.
Wellingborough Museum	Museums	Ian Nunney, Museum Archaeologist	wellingboroughmuseum@msn.com 01933 276838	1. Help boost ancestral tourism	1. House Northants FHS who operate drop in service 2. Most museum front of house staff have family history enthusiasm (80 volunteers in total) 3. Some original records e.g. school records and copies of local newspapers. Indexed to a degree but not by name and not online
Sulgrave Manor (ancestral home of George Washington)	Historic Houses	Wendy Barnes, Director	wendy.barnes@sulgravemanor.org.uk 01295 760205	1. to gain consensus and way forward with a realistic plan after other false starts 2. to recognise different levels of sophistication in market from family historian interested in detective work of facts and dates to real ancestral tourism interested in place and atmosphere 3. support role of local history in playing part in ancestral tourism 4. supporting cross-county ancestral tourists 5. signposting and staff development	1. significant local and family history expertise and understanding of director 2. Free meeting space 3. 1-2 days per month 4. a collection of GW memorabilia, an exhibition on his early life, a museum devoted to the history of the Washington family from 1530s to GW's death. Transcribed and indexed (by family and place name) a collection of 16 th – 19 th century documents on the history of the estate with over a 1,000 named individuals.

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Northampton Family History Society	Famly History Societies	Angela Makin, Chair	angela.malin@btinternet.com 01604 862017	1. Boost volume of family historians and level of expertise	1. Possible funding of £2k 2. 1500 members and skills family history researchers 3. Good communication network with members 4. Based at Wellingborough Museum
Northampton Central Library	Local studies Libraries	Jon-Paul Carr, Northamptonshire Studies Librarian	enquiredirect@northamptonshire.gov.uk 01604 462040	1. signposting service 2. coordination with other local studies/local history services and museums throughout county	1. extensive knowledge and experience of local history of Librarian 2. extensive network of local history contacts 3. significant collections and Heritage East Midlands Sense of Place digital photographic online resource

Nottinghamshire

Potential Network Member	Representing	Represented by	Contact Details	Organisational aims for Network	Resources to offer
Nottinghamshire Record Office	County Record Office and archives	Mark Dorrington	Mark Dorrington 0115958 1634	1. increasing use of record office (virtual or visit) 2. supporting local economy via tourism 3. strengthening links with related	1. Existing RO resources and information inc. publications on web and staff expertise 2. Links to joint leaflet/information resources (but not hosting as CC

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				heritage organisations and tourism organisations 4. Creating joint information resources and promoting them	issues re. branding/format etc) 3. Possibly hosting of post or temporary space when in Notts 4. Could possibly apply for £ from CC tourism budget if right fit.
Nottingham City Museums and Galleries	Museums	Ann Inscker, Manager History and Archaeology Team	Ann Inscker 0115 915 3620 anni@ncmg.org .uk	1. increasing visitors to museum/local area 2. supporting local economy via tourism 3.greater collaboration with other heritage and tourism organisations 4. building on the work they have done at Brewhouse Yard 5. joint information resources/guides of interest too. NB. Director interested.	1. Expertise – particularly work done on Brewhouse and associated families 2. Contacts and established links to genealogy sites 3. Additional family information related to donations (but confidential information) 4. Established working with experienced volunteers 5. Linking/promotion of any resulting information resources
Galleries of Justice	Museums	Bev Baker		tbc	1.
Nottinghamshire Family History Society – in principle yes to involvement <i>*NB Stuart needs to ask Society formally if they want to be</i>	Family History Societies	Stuart Mason, President	Stuart Mason 0115 9215788 notts fhs@fastmail.fm	1. supporting people doing FH research 2. creating packages which would help people wanting to visit (NB get asked for help with this quite regularly eg, USA visit this July09) 3. having better understanding of	2. Website promotion 3. Information resources inc. publications on web (or through on line shop) 4. Significant local and family history expertise

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<i>involved. Meeting on 16.01.09</i>				what others hold and creating linked information resources 4. making their expertise, information and resources even more widely available.	
Experience Nottinghamshire	Tourism including TICs	John Heeley CX	John Heeley 0115 962 8302 John.Heeley@experiencenottinghamshire.com	<i>Not currently considered a priority for development – see DMP and EMT meeting mid January.</i>	
East Midlands Tourism	Tourism (strategic)	Chas Baker Chair EMT Council and CX Space Centre	Chas Baker 0870 607 7223 chasb@spacecentre.co.uk	Will wait to give an answer until we have spoken to Ruth Hyde but said it might be of interest to EMT.	The Council is an advisory board, not a strategic board. The Exec Team take the initiative and then take proposals/ideas to Council.
The Workhouse,NT	NT	Rachel Harrison Manager		Awaiting a response following meeting with Steve La Mottee	
Museum Development	Independent museums	Mark Laurie		Could be contacted to join to rep independent museum sector until it was clear which museum would have greatest interest in the work	
Local Studies Library?				Tbc if network goes ahead	

Appendix Two

Draft Agenda for information briefing day 23 February 2009

- 10.30am Coffee
- 11.00am Introduction to the day (Sam Bestwick, MLA and Penny Baker Lincolnshire Tourism)
- 11.10am Ancestral and Literary Tourism in East Midlands – background and context to research project (growth of genealogy and family history as hobbies; development of literary tourism and overview of the East Midlands)
- 11.30am An introduction to Ancestral Tourism in Scotland – key characteristics, products and trends
- 12.10pm Ancestral and Literary Tourism in the East Midlands – key characteristics and current activity (evidence of unrecorded activity and a potential market?)
- 12.30pm Questions
- 12.45pm LUNCH (including opportunity to meet other participants from your county who are interested in being part of a network and/or sharing information resources and ideas. E.g. Set out areas in the room where people from each county can meet/go and have their lunch, possibly facilitated by Steering Group and consultants)
- Ask people to discuss amongst them selves:
- i. Who has contact through work of people tracing their family history, and what is most common request for help? What are main obstacles in helping?
 - ii. How do you think we can engage with and influence the market?
 - iii. Which report recommendations would you be most interested in seeing developed?
- 2.00pm Ancestral and Literary Tourism in the East Midlands –ingredients for success and opportunities for future development - invite comment or feedback from participants following discussion over lunch
- 2.30 pm Discussion

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3.00pm Next steps (MLA, EMT etc)

3.20pm Tea and opportunity to formally sign up interest in different initiatives

Appendix Three

Ancestral Tourism Training – outline programme

What is ancestral tourism?

Background, what motivates ancestral tourists, market profile/characteristics, what's happening elsewhere (comparator projects), what's happening at local/regional level, role of local ancestral network.

What do ancestral tourists want to know?

Group exercise

1.1.1 Introduction to national resources

Discussion and look at examples of various internet resources. A handout will be prepared giving details on resources being discussed.

1.1.2 Local resources

Group exercise followed by discussion and exchange of local information.

1.1.3 Guest speaker

A local guest speaker (usually from Archives/Records Office or local Family History Society) will be invited to discuss a local resource.

1.1.4 Customer service

Group exercise: How could we improve ancestral tourists' experience?

1.1.5 Marketing

Group exercise: What can you do and how will you do it?

Appendix Four

East Midlands Family History Survey Draft

We would be grateful if you could share some information with us about your family history search. This information will help us to develop new products and services for family historians and ancestral tourists alike. As a special thank you for your time, you will be entered into a free prize draw to win xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx. The draw will take place on xxxxxxxxxxxxxxxxxxxxxxxx and the winner will be notified by xxxxxxxxxxxxxxxxxxxx.

Good luck!

2 Q1

Which county did your ancestors originate from?

- Derbyshire
- Leicestershire
- Northamptonshire
- Nottinghamshire
- Lincolnshire

3 Q2

Which sources have you previously used for your family history search?

- General Register Office
- National Archives
- Website If yes, please say which
- Local Family History Society
- County Records Office
- Local Archives
- Library
- Museum

Tourist Information Centre

Other Please state

4 Q3

Have you previously taken a holiday or short break in the East Midlands?

Yes

No

If yes, go to Q4

If no, go to Q8

5 Q4

How long did you stay in the area on your last visit?

1 – 3 nights

4 – 5 nights

6 – 10 nights

Over 10 nights

6 Q5

What type of accommodation did you stay in on your last visit?

Hotel

Bed & Breakfast/Guest House

Self-catering

Camping/Caravanning

Youth Hostel

Stayed with friends and relatives

Other Please state

7 Q6

What tourist activities did you engage in on your last visit?

- Visited attractions such as castles, museums, arts
- Explored the scenery
- Toured around the country
- Visited cities
- Visited friends and relatives
- Visited pubs and restaurants
- Shopping
- Walking
- Golf
- Fishing
- Cycling
- Watersports
- Other Please state

8 Q7

What proportion of your time did you spend on genealogy-related activity on your last visit?

- Less than 10%
- Between 10% and 25%
- Between 25% and 50%
- Between 50% and 75%
- Over 75%

Now go to Q9

9 Q8

If you haven't previously visited the East Midlands, what would influence you to visit?

- Great travel deals
- Special ancestral package

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- Information on genealogy-related events
- Information on cultural events
- Other Please state
- None of these

Now complete the remaining questions.

10 Q9

What is your gender?

- Male
- Female

11 Q10

What is your age range?

- Under 18
- 18 – 34
- 35 – 44
- 45 – 54
- 55 – 64
- Over 65

12 Q11

What is your country of residence?

- England
- Scotland
- Northern Ireland
- Republic of Ireland
- USA
- Canada

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- Australia
- New Zealand
- Other Please state

The xxxxxxxx Ancestral Tourism Network would like to keep you up to date with genealogy-related products and services that may be useful to your family history search. Please tick here if you would like to receive this information.

- Yes, by post
- Yes, by email

Name

Address

.....

.....

Email

Appendix Five

Evaluation of Tennyson and DH Lawrence Festivals 2009 - Suggested additions to tender, following on from section 2.10 Aims and Purpose of study

Outputs

The evaluation consultants will be expected to produce:

- An agreed methodology to capture and analyse data to meet core requirements of the evaluation
- A draft report for comment/approval
- A final report detailing content, aims, methodology, analysis of quantitative and qualitative data, conclusions (including critical success factors, strengths and weaknesses of Tennyson 2009 and DH Lawrence Festival), recommendations for any future literary tourism product development in the East Midlands
- An executive summary of the final report
- A presentation on key findings

Timescale

- A consultant will be appointed by end of April 2009
- An agreed methodology for evaluation and data capture will be required by end of May 2009
- Data capture, interviews and analysis will take place June to January 2010
- The final report with executive summary is required by end of February 2010
- Publication of final report and executive summary by end of February 2010

Proposed budget: The maximum allocated budget for this project is £12,000 inclusive of all VAT, travel and expenses.

How to tender:

Consultant(s) interested in tendering should set out in no more than 8 sides of A4:

- Brief explanation of why you are interested in this evaluation
- Knowledge, skills and experience in the fields of evaluation of heritage and or tourism projects for all personnel involved
- Details of proposed methodology, project plan and timetable
- Budget including allocation of days to each of key tasks in project plan and to each individual with their cost per day. If any part of the work is to be subcontracted, please show this clearly. The total cost of the proposal should be clearly stated, with VAT (where applicable) shown separately. The cost breakdown should include an estimate of travel costs and expenses.
- An example of previous relevant project work
- Contact details
- Contact details for referees

Selection Criteria

Ancestral and Literary Tourism in the East Midlands

- Demonstrable experience of delivering complex evaluation projects, on time and within budget
- Experience of a range of quantitative and qualitative data collection methodologies
- Suitability of proposed methodology to meet the project aims
- Knowledge and understanding of the heritage and tourism sectors
- Knowledge and understanding of East Midlands
- Value for money

Interviews: The Steering Group reserves the right to hold interviews with tenderers, if necessary, on XXXX

For further information on this brief, please contact: xxxx

