



# A Manual for Owners

Opening Your Garden  
or Landscape to the Public





The entire Capability Brown Festival is built on the premise that designed landscapes matter, for wellbeing, peace and tranquility, for fun and recreation.

The Owners' Manual was created as part of the Capability Brown Festival 2016. It aims to provide support and guidance to sites both large and small, private, public and commercial in opening to the public and creating a positive visitor experience. It is intended for use by sites of all scales with varying levels of experience opening to the public.

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[www.capabilitybrown.org](http://www.capabilitybrown.org)



This document has been written and produced by Tricolor, in partnership with the Capability Brown Festival.



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## A Welcome from the Chair

A legacy is a gift, a bequest, something that is passed on and is of benefit. The entire Capability Brown Festival is built on the premise that designed landscapes matter, for wellbeing, peace and tranquility, for fun and recreation. Designed landscapes can be enjoyed and interpreted by all ages and backgrounds, by communities and visitors for the delight of all. The Owners' Manual, which I cannot recommend more highly, is not just a practical working document, but will form part of the legacy of the Festival, part of a first attempt to bring together 21 partners working collaboratively to reach new and established audiences. The Festival will unite Brown's sites making them accessible for families, adults and urban audiences, inspiring new generations of visitors, participants and experts to leave a legacy of new information, skills and enthusiasm for landscape.

The Festival will encourage those who might not have had the inclination or the opportunity to visit parks and gardens, show them what fun it is to explore them and how beautiful and rewarding visiting designed parks and gardens of any period can be. The 300th Anniversary of the birth of Capability Brown provides the perfect opportunity to reach as many people as possible as he worked from Northumberland down to Devon and over into Wales, making his works accessible to huge numbers of people, to discover, develop knowledge and be inspired. The huge range of activities all over the country, serious, entertaining, academic, witty, energetic and sporting provides for all interests and tastes.

The Owners' Manual aims to provide support and guidance to owners and guardians, both large and small, private, public and commercial on opening their sites and creating a positive visitor experience. There are many different ways of doing this; tips are given on opening your site to the public, on accessibility, on working with volunteers and most importantly, communicating with potential visitors and the press. Detailed appendices focus on providing more practical advice with templates designed to provide visual examples.

I know, as the Trustee of Capability's smallest surviving pleasure ground with limited opening, just how much fun, cost effective and rewarding opening your site can be. You can help to give a lasting legacy that will benefit so many visitors who now and in the future will surely support these beautiful places. I took part in Heritage Open Days for the first time in 2014; if you would like to read more about my experience of working with volunteers and to see my suggestions for opening your site for Heritage Open Days please see the link below.

<http://www.capabilitybrown.org/news/cadland-gardens-our-first-heritage-open-days-experiences-and-tips>

**Mrs Gilly Drummond OBE DL Hon.FLI**  
Chair of the Capability Brown Festival

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## **A Guide to this Manual**

This Manual has been created to support the owners and staff of properties lucky enough to have been landscaped by Lancelot “Capability” Brown, who are considering or intending to open to the public, or that already receive visitors and would welcome guidance on how to develop their offer further. A huge range of properties choose to share their historic landscapes and architecture by opening to the public, from small, private sites like Cadland near Southampton, to international tourist destinations such as Blenheim Palace. The practical advice offered here hopes to offer something for sites of all sizes and experience levels.

The Manual itself covers the basic elements to consider for sites with limited opening experience. The Appendices then offer more detailed information about specific areas. This is for sites to refer to once their experience and confidence has grown, or can be used as a helpful reference for more experienced, well-established sites.

The Manual has been split into three main sections:

### **1. Opening to the public: The Basics**

### **2. The Visitor Experience**

### **3. Templates**

The first section looks at the basic things you need to have in place before you open your site to the public and the essential points you must consider. The second section gives practical advice on how to provide your visitors with the best experience possible, whatever the size of your site or your level of experience, including an event management planning template ready for your site to use. The third section provides ready-to-use templates for managing risk assessment and event planning.

A separate set of five Appendices is also available to provide you with more in-depth information on specific areas:

**Appendix A – Volunteers: Recruiting and managing**

**Appendix B – Interpretation: Sharing your venue’s story**

**Appendix C – Audience development & Activity ideas**

**Appendix D – PR & Marketing toolkit**

**Appendix E – How are we doing? A guide to evaluating your project**

For each area of focus in both the Manual and the separate Appendices, lists of useful web links provide access to further sources of information and guidance.

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Disclaimer: Everything within this document reflects the legal standing as of March 2016 – please check current legislation if reading at a later date





# Opening to the public: The basics

# 1. Opening to the public: The basics

## Why open to the public?

You are reading this Manual because you own or work for a beautiful historic property made unique by the vision of Capability Brown. You may already know from experience that opening to the public is rewarding and enjoyable, however, even if you've never opened to the public before, your common sense knows that practical and business issues do crop up on occasion, however experienced or savvy a site's owners/managers/staff might be. This Manual is designed to help sites of any size or experience to plan in order to prevent issues occurring where they might be avoided, and how to deal with them if they do.

## WHY OPENING TO THE PUBLIC IS REWARDING FOR YOU?

- It puts your site on the tourist map and raises its profile locally and more widely.
- It can help you to fulfil grant or Conditional Exemption conditions that might apply to the heritage in your care.
- It can help you to meet conditions for tax exemptions.
- It can provide regular or seasonal revenue.
- It engages your local community with the historic house and landscape in your care, providing opportunities to build relationships.
- It provides opportunities for you/staff to develop business skills.

## WHY OPENING TO THE PUBLIC IS REWARDING FOR OTHERS?

- People learn more about heritage and are more likely to appreciate the importance of conserving it for future generations.
- Your site provides a place to spend quality time with friends and family, outdoors in a beautiful environment away from noise, overcrowding and pollution.
- Adults and children get the chance to learn something new together.
- Working or volunteering at your site helps local people to develop useful skills and confidence.
- Your local community will feel increased pride in what the area has to offer visitors from outside the region.

## Risk assessments

This section will help you think about risk management for your building, your landscape, your staff, and your heritage, including your collections and property.

You will probably already be aware of the major risks associated with the building, contents and landscape. You also need to have a plan in place when opening your property to the public, or for large scale public events, to ensure that you consider and manage the risks to others. This will protect both you and your visitors.

### **SENSIBLE STEPS TO MANAGE RISKS**

In terms of risk management, you should:

- Identify the risk
- and then
- Reduce the risk

What this involves will vary depending on the size and scale of your event. As a venue owner, you must thoroughly assess the risks involved with a visit to your site and do as much as you can to mitigate them. But there is no need to panic; this is not about producing large amounts of paperwork (although it is a good idea to record your risk assessment), rather, it is about identifying sensible measures to control the risks.

The Health and Safety Executive is responsible for enforcing health and safety legislation in the UK. It requires you to take action to ensure that risks are “as low as reasonably practicable”, and produces a range of guidance and practical resources on assessing risk (see Useful links below).

### **AGREE WHO’S RESPONSIBLE**

The level of detail in your planning should be proportionate to the scale of your event and the degree of risk. Whatever the scale of the event, make sure there is a clear understanding within the organising team of who will be responsible for safety matters. For organisations with five or more employees, this is likely to be driven by the organisation’s health and safety policy.

### **TALK TO YOUR LOCAL AUTHORITY**

You should let your Local Authority know if you plan to hold a large event – events or activities attended by relatively small numbers are fine with just a risk assessment, but ask for advice from your Local Authority if you are unsure. For larger events you may need to involve a Safety Advisory Group (SAG).



To find your local SAG, search online for 'Safety Advisory Group', followed by the name of your local council. Alternatively, call up your local council and ask for the contact details for your local SAG. SAGs usually include local council representatives and the emergency services. Discuss with them how you can control risks at your event. Their advice will help you to create a safety plan. For more information on Safety Advisory Groups see **Useful links** below.

## ASSESS YOUR RISKS

The key tool for creating a safety plan is the process of risk assessment. A good starting point is to walk around your site and note down any hazards, or anything that could cause an accident. When you have done this, spend some time thinking about how serious the harm could be and any ways of preventing or reducing the risk. Ask your employees or volunteers to do the same. Make a list, or use the template included in **What you need to think about: Risk assessments** of this manual (in Section 1), and ensure that you implement all of your ideas for reducing or preventing the risk.

## PLAN WHAT TO DO IF INCIDENTS HAPPEN

You must have plans in place to respond effectively to health and safety incidents and other emergencies that might occur at an event. Your emergency plan needs to be in proportion to the level of risk presented by event activities and the potential extent and severity of the incident.

### DAMAGE LIMITATION

Create a standby procedure checklist for staff and volunteers to follow for a range of potential unplanned events that might affect visitors negatively if not dealt with promptly and efficiently.

Make sure that everyone is aware of these checklists and understands the procedures they'll need to follow.

Try keeping the checklists in easily identifiable folders in volunteer/staff areas (including the break room), as well as staffed points around the site (including the admission desk and shop if you have one).

## BEFORE AND AFTER YOUR EVENT

### Think about staff, volunteers and external contractors

In addition to considering the risks to visitors to the site during your event, you also need to consider the health and safety of contractors, employees and volunteers in setting up and taking down an event. This will include:

- having health and safety arrangements in place to control risks, and proper co-ordination of work activities
- ensuring that any contractors are properly qualified and have the right skills for the work they are contracted to do
- providing your volunteers, employees and others with relevant information on any risks to their health and safety
- ensuring the competence of volunteers and staff to undertake their role safely
- monitoring health and safety compliance
- reviewing your health and safety arrangements

### Build on your experiences

It is good practice to debrief after an event. For large-scale events, consider including other agencies like the police and Local Authority in the debriefing process. Listen to problems and successes and make improvements for future events.

### Useful links

Introduction to and advice on Safety Advisory Groups

<http://www.hse.gov.uk/event-safety/safety-advisory-groups.htm>

Health & Safety Executive – information and example risk assessments

<http://www.hse.gov.uk/risk/casestudies>

The Occupational Safety and Health Consultants Register – OSHCR

<http://www.oshcr.org>

Fire Risk Assessors Certification Scheme

<http://www.warringtoncertification.com/fracs.html>

If you are a Member of the HHA:

<http://www.hha.org.uk/members-homepage/advice-and-guidance/health-and-safety-advice.html>

## INSURANCE

This section will help you think about insurance for your venue, your building, your landscape, your staff and your heritage, including your collections and property.

### Types of insurance

You will most probably already have some sort of buildings and contents cover, but do you have the correct insurance in place when opening your up your property to the public or for large-scale public events?

The main headings (but not restricted to) in terms of insurance should include:

- Public Liability Insurance
- Professional Indemnity Insurance
- Employers' Liability
- Product Liability
- Legal Defence Cover

### Making sure you have the right cover

In making sure you have the right insurance cover in place you should consider issues like:

- Have you currently got the right cover? Are you insuring your buildings, contents, land, staff etc.?
- Do you have access to any central risk management advice (for example, from the Historic Houses Association or Country Land & Business Association) on how to protect your property and land
- When were the properties last valued? (You need to be aware of under-insurance as this could seriously affect any claims made.)
- Are antiques and valuables appropriately protected, for example are they valued and insured on the right basis and stored and kept correctly and safely?
- Do you have an inventory of all of your belongings? This is very important especially if the house is open to the general public or if events are held there
- Are your current insurers aware of the full activities that take place? Is the house open to the public throughout the year? Do you hold special events? Are the grounds open all year round?
- Do you out-source events to third party events companies and do you know if these companies have the correct insurance whilst they are on your land and in your property?

- Does the current policy provide cover for PR management, for example in the event of a fire or burglary who will speak to the press and protect your reputation? This can be particularly important for venues used for conferences, filming and large scale events (for more on PR see **Appendix D – PR & Marketing Toolkit**).
- Do you have specific claims processes in place? Have you got someone to come and 'hold your hand' throughout the whole claim process to make sure your side is being fought correctly and fairly and to make sure you are protected from the third party insurers?

### Security

In terms of security, you should review the provision currently in place within the property and around grounds. Do you have...

- CCTV within the main house, at the main entrances, in the car park and around the grounds? (This should include vulnerable areas within the grounds.)
- Burglar or intruder alarms?
- Fire alarms?
- Coded access for private areas and offices?
- Staff or volunteer-only zones?
- Independent enclosures, casings, cabinets and sensors if you have valuable items on show?
- Manned security for large scaled public events? For small-scale events this could just mean deploying volunteer room or garden stewards in key locations
- Outsourced security for large events?

### Using a broker

Given that there are so many variables to consider it might be advisable to speak to a broker to guide you through the whole insurance process and design an insurance package specific to your needs and requirements.

### The Government Indemnity Scheme

The government also offers an alternative to traditional commercial insurance, particularly for any historic collections. This is called the Government Indemnity Scheme and links to further guidance can be found in the Useful links below.

## Useful links

AXA

<http://www.axa.co.uk/insurance/business/public-liability>

Swinton Insurance

<http://www.swinton.co.uk/business/liability-insurance/public-liability>

Insurance comparison website – business insurance guides

<http://www.moneysupermarket.com/c/business-insurance/guides>

Government Indemnity Scheme

<https://www.gov.uk/guidance/government-indemnity-scheme>

If you are a Member of the HHA:

<http://www.hha.org.uk/members-homepage/advice-and-guidance/security-advice.html>

## Accessibility

This section will help you think about how to improve your venue and services so that disabled visitors (as well as volunteers or staff), can engage as fully as non-disabled visitors.

Some of your visitors will have a disability. It may or may not be obvious. A wheelchair, white stick or guide dog are obvious clues, but many disabilities are far less obvious, such as hearing impairment or a learning disability.

Good customer care is always good business practice, but often disabled people experience a worse service than non-disabled people. A few simple adjustments can make the difference between a disabled person choosing to visit your site or not, including older people who can't move around as easily as they once did or whose eyesight is poor.

### WHAT IS DISABILITY?

The Equality Act 2010 defines disability as 'a physical or mental impairment which has a substantial and long-term adverse effect on a person's ability to carry out normal day-to-day activities'.

Impairments include:

- mobility problems
- visual impairments
- hearing impairments
- speech impairments
- hidden impairments (e.g. dyslexia)
- mental health issues
- learning disabilities/difficulties
- conditions such as diabetes and epilepsy

#### The Equality Act (2010)

This Act of Parliament aims to protect disabled people and prevent disability discrimination in all areas of life, including access to goods, services and facilities. The Act sets out the point at which there is a duty to make 'reasonable adjustments' for disabled people. That point is where a disabled person would be at a substantial disadvantage compared to non-disabled people if a required adjustment was not made.

For more information and guidance see Useful links below.



### Key points regarding disabled access:

- It is essential to make reasonable adjustments to enable all people, regardless of whether they are disabled or not, to have enjoyment of the site. This principle is enshrined in The Equality Act (2010), which you can read in detail via Useful links (below).
- Proactive steps must be taken to ensure that disabled visitors are not put at a significant disadvantage when accessing sites. This might mean that displays, access/exit points or pathways need to be altered. This is a continuous duty, meaning that site owners will need to make periodic reviews in order to ensure that accessibility is maintained. Minimum standards for access are set out in Part M of The Buildings Regulations (2010) – see Useful links (below).
- Potential barriers to access for disabled people must be anticipated. This means that careful thought must be given in advance of opening, to the potential needs of disabled people.
- Sites must be able to accommodate people with a range of different disabilities.
- ‘Reasonable adjustments’ is not defined by The Equality Act – it is up to the organisation to determine what that constitutes.

### Good practice:

- Seek listed buildings/planning approval for any physical adjustments to buildings, even if the changes are designed to improve disabled access.
- Where necessary adjustments, as set out in Part M of The Building Regulations (2010) may be constrained by existing buildings and surrounding environs, an access statement should be made in support of the planning application. Potential reasons for not meeting the minimum standards for access include impracticable or disproportionately expensive adaptations, in which case alternative compensatory measures may be proposed. The access statement demonstrates that efforts have been made to broaden access to a site and should not be used as an opportunity to circumvent access standards.
- Undertake an access audit. This will help you to determine potential barriers and obstacles to access, and how you might make adjustments to resolve or bypass these issues. Employ an access consultant to undertake the audit (see Useful links below) or, if you are a member of the HHA you can chat with an access consultant as part of your membership (see Useful links below).
- Your access plan will be developed with the access audit (see point above) as its foundation. The access plan should consider the range of disabilities in the broadest sense and consider both physical and intellectual access. For example, the access plan should not focus solely on wheelchair users.

You should also consider how easy is it for people with sight impairments to navigate your site, what options there are for people with learning difficulties to access your interpretive materials (including text panels and information leaflets).

- Consult with disabled people during the course of access planning. Ask them to identify potential barriers to their access and enjoyment of the building and/or site? What would they perceive to constitute reasonable adjustments at your site?

### **Accessibility and listed buildings/landscapes**

The Equality Act does not override other legislation, such as listed building or planning legislation, and the need to consider necessary consents applies to changes proposed to improve access. Therefore, if your property is listed or a Scheduled Ancient Monument, you still need to gain consent for any changes, even if they are provided solely to improve access.

Historic England provides advice on disabled access to listed buildings and historic landscapes (see Useful links below), and how to balance the needs of visitors with conservation.

All Historic Houses Association (HHA) sites are listed buildings. The HHA offers members bespoke advice on disabled access for listed buildings via its website (see Useful links below).

### **Simple adjustments can benefit everyone**

Disabled people make up a significant percentage of the general population, including your visitor base. Making some simple, low-cost adjustments and additions for disabled people to your venue and services will make them better for other visitors too, including:

- families with young children in pushchairs
- older people
- visitors temporarily disabled by an accident or illness
- family or community groups with disabled members

If disabled people are going to struggle to get around your venue, or if they're not going to feel comfortable and safe or enjoy themselves, then their families, friends or carers probably won't visit you either.

Disabled people might decide to visit your venue on their own or as part of a family or social group made up of non-disabled people. They could visit you at any time, so make it a priority to do what you can to make your venue as accessible as possible right now and support your staff and volunteers with disability awareness training (see **Useful links** below).

It's estimated that the purchasing power of disabled people is £80 billion per year, which makes them a significant customer base for your venue.

### WHERE DO WE START?

Adapting your venue and services to make them more accessible for disabled people doesn't have to mean major upheaval or cost.

Start by looking carefully at what you offer visitors already or what you are planning to offer. What adjustments to your venue and services could you make so that disabled people aren't left out?

Think about:

- getting around the different areas of the site
- facilities (e.g. toilets, café, shop)
- events and activities
- signage
- printed information (including leaflets, menus etc.)
- website

### You don't have to do everything at once

Once you've identified issues for visitor access, draw up an action plan for adjustments that can be carried out:

- Immediately
- In the near future (e.g. within six months)
- In the longer term (e.g. within two years)

You don't have to do it all at once. Some adjustments can be made quite easily and quickly, while others might need time for more planning and budgeting or fundraising. Some more significant changes will require planning consent, so always check with your local planning department first.

Creating an action plan with set timeframes will help you to stay focused and will ensure that your venue becomes accessible to everyone as soon as possible.

## Key adjustments you should consider

Aim to:

- Provide good customer care through disability awareness training for your staff and volunteers
- Provide a hearing loop on ticket and shop counters and information desks
- Use Large Print text for all of your signage and printed material
- Provide parking reserved for disabled visitors
- Provide information on your website about what you provide
- Provide a wheelchair that visitors can use during their visit (a basic self-propelled and push model)
- Ensure there's enough room for a wheelchair user to move comfortably around your shop and café if you have either
- Provide refreshment facilities if at all possible, even if its only a temporary 'pop-up' tea room in an available room in the house on open days
- Provide chairs and benches around your site so that visitors can rest
- Provide an accessible toilet (see the Facilities section in this manual)

These adjustments are explained in more detail in the pages below.

## Access Audits

There is a well-developed process for assessing whether physical features present a barrier to access, and for planning access improvements to overcome these barriers. This involves undertaking an access audit of your site. Access audits are usually undertaken by an access consultant (you can find one via the National Register of Access Consultants, see **Useful links** below), a local disability organisation or access group. The Historic Houses Association (HHA) provides an access consultant for members (see **Useful links** below).

For more guidance for historic venues with gardens and grounds, read Historic England's *Easy Access to Historic Landscapes* and *Easy Access to Historic Buildings* (see **Useful links** below).

## Key adjustments explained

### Induction loop

- An induction loop is a special type of sound system for use by people with hearing aids.
- You've probably already noticed them on ticket desks and shop or bank counters (look for the symbol showing an ear and 'T').

- The hearing loop provides a magnetic, wireless signal that is picked up by the hearing aid when it is set to 'T' (Telecoil) setting. Loop systems can be wired around a specific room (like a shop, café or function room), or come as a small portable kit for placing on a flat surface in a more intimate space (like a shop counter or information desk). The loop can be used by any number of visitors at the same time.

### Large Print

You want as many of your visitors as possible to be able to read the signage around your site, as well display labels and printed information, including ticket price lists and café menus.

The recommended minimum font size is 14 point for handouts and 18 point for signs and display labels and panels. The typeface should be 'sans serif' (i.e. it doesn't have serifs, those small decorative lines at the ends of characters). Popular sans serif fonts include Helvetica, Avant Garde, and Arial. For more guidance see **Useful links** below.

Provide magnifying glasses for visitors with visual impairments. These can be used for exhibitions, labels, handouts, signage and for seeing plants and flowers in close up in your gardens.

### Accessible parking

According to government statistics, 2.39 million people in the UK held Blue Badges in March 2015. The national Blue Badge scheme supports those with severe mobility problems, who have difficulty walking or using public transport, to park close to where they need to go.

Your visitors will definitely include Blue Badge holders, as well as people with mobility impairments who are driven to your venue by friends and family.

Suggestions:

- reserve car park areas closest to the facilities for disabled visitors
- allow Blue Badge holders to park on roadways outside facilities
- allow disabled people to be dropped off/collected outside facilities

### Grounds and buildings

The most expensive changes you are likely to have to make are physical adjustments to meet the needs of people who have problems using stairs, steps and steep slopes.

If the visit includes buildings, visitors with visual impairments will also benefit from certain physical access improvements such as:

- tapping rails alongside paths
- coloured nosings (front edges) to stairs

Under the Equality Act, where a physical feature (steps, steep slopes, heights of desks or displays, etc.) makes it impossible or unreasonably difficult for disabled people to make use of your services, you must take reasonable steps to remove, alter or avoid the feature, or provide the service or experience by alternative means.

Improvements might involve:

- removing a short flight of steps and replacing it with a slight slope
- altering a longer set of steps to provide a ramp to one side, in addition to the step
- lowering or moving a reception or ticket desk
- providing a lift as well as retaining a staircase to an upper floor (or providing images, plans or a virtual tour on a computer of the inaccessible part of a historic building or grounds which cannot be altered for conservation reasons)

### **Useful links**

Disability Awareness training for volunteers/staff – free self-led downloadable course (Museum of London Volunteer Training)

<http://www.museumoflondon.org.uk/supporting-london-museums/resources/training-bank>

Equality Act 2010

<https://www.gov.uk/guidance/equality-act-2010-guidance>

National Register of Access Consultants – for advice and access auditing

<http://www.nrac.org.uk>

Royal National Institute of the Blind

[www.rnib.org.uk](http://www.rnib.org.uk)



Action on Hearing Loss (formerly RNID)

<http://www.actiononhearingloss.org.uk>

Part M of The Buildings Regulations (2010)

<https://www.gov.uk/government/publications/access-to-and-use-of-buildings-approved-document-m>

Easy Access to Historic Buildings (Historic England):

<https://content.historicengland.org.uk/images-books/publications/easy-access-to-historic-buildings/heag010-easy-access-to-historic-buildings.pdf>

Easy Access to Historic Landscapes (Historic England):

<https://content.historicengland.org.uk/images-books/publications/easy-access-historic-landscapes/heag011-easy-access-to-historic-landscapes.pdf>

Guides to help open space managers improve accessibility (Sensory Trust)

[http://www.sensorytrust.org.uk/resources/by\\_all\\_reasonable\\_means.pdf](http://www.sensorytrust.org.uk/resources/by_all_reasonable_means.pdf)

<http://www.sensorytrust.org.uk/information/factsheets/index.html>

Providing accessible parking – good practice guide

<http://www.disabilityaction.org/news/item/695/providing-accessible-parking-a-guide-to-best-practice>

Accessible communication formats

<https://www.gov.uk/government/publications/inclusive-communication/accessible-communication-formats>

Inclusive communication guides

<https://www.gov.uk/government/publications/inclusive-communication>

Historic England guidance on access in listed buildings

<https://historicengland.org.uk/advice/hpg/compliantworks/equalityofaccess>

Advice for HHA members on disability access (Historic Houses Association)

<http://www.hha.org.uk/members-homepage/advice-and-guidance/disability-advice.html>



The visitor experience

## 2. The visitor experience

If you are taking the time and trouble to open your site to visitors, you will want to make sure they have the most enjoyable experience possible. Satisfied customers spread positive publicity about your site for free. Look at building your relationship with your visitors in terms of what you can provide that they need and want for their enjoyment, comfort and safety. The best advice for planning your visitor experience is to put yourself in your visitor's shoes... What are other venues offering that make them visit again or tell their friends about? What would make each stage of their visit smoother, simpler and more engaging, from planning their outing via your website/leaflet, then moving around your site, discovering its story, before buying souvenirs as they leave?

## Put yourself in your visitors' shoes...

*I'm planning to drive/travel by public transport to the site – where can I find maps and other information about getting there? When is the site open? Once we arrive, how much will admission cost for each person in my party, including children and concessions? I want to see and do as much as I can during my visit, so I'll need information about what's going on/what facilities are provided, when and where, both before and during my time there. When feet tire and hunger gnaws, are there places for us to rest and buy refreshments? We'll have young children with us – are toilets clearly signposted? Is there somewhere private where I can change my baby? I always buy a postcard from each place I visit – can I buy one here?*

In this section you'll find some simple guidelines to help you provide the best possible visitor experience.

## Before they arrive

### VISITOR INFORMATION

Your visitors' experience begins from the moment they click on your website, or arrive at your site. Here are some key things to consider when planning visitor information.

#### What do visitors need to know about?

- The venue and its history
- Key points of interest (the things/features/views they really shouldn't miss)
- Events and activities programmes
- School programmes and resources
- Facilities – café, shop, toilets, baby changing
- Accessibility for disabled people
- Opening hours
- Admission costs
- Location (some rural sites might want to advise visitors of any SatNav quirks!)
- Local transport
- Parking
- Private hire – weddings, conferences, corporate events
- Contact details
- Friends' organisation
- Volunteer opportunities
- Any unexpected or planned events/changes that might/will affect their visit

#### Where is information provided?

- Website
- Entrance to site
- Admission desk (if there is one)
- Information desk (if there is one)
- Areas of particular interest

#### What form is it provided in?

- Website downloads (digital and printable)
- Help from staff/volunteers
- Map or plan of grounds (to download from website and available at venue as hard copy)

- Floor plans of interiors (to download from website and available at venue as hard copy)
- Leaflets
- Guidebooks
- Signage

### Managing expectations

Sometimes visitors can have a poor experience simply because they expected more than a site could deliver. You can help to mitigate against that by giving clear information in advance. Manage your visitors' expectations by:

- clearly advising what will and won't be available to visitors (e.g. the house won't be open, or you might not have a café or shop, etc.)
- outlining the length and content of tours and where they go (e.g. whether the terrain is suitable for buggies or wheelchairs)
- specifying whether cameras are allowed
- making them fully aware as soon as you can about any unexpected or planned events/changes that might/will affect their visit e.g. closure due to flooding

### Information on Accessibility

Your visitor information should also make mention of how accessible you are.

People with disabilities often plan outings very carefully. Many will do some online research about your venue, to decide whether visiting you is going to be worth their time and the physical effort it may involve. Your website should provide disabled visitors with all that they need to know to feel confident about coming.

An Access webpage should provide detailed information, including:

- What physical support you provide for disabled visitors (including induction loops, magnifying glasses, a wheelchair)
- Whether there is parking generally and accessible parking specifically
- Whether you have accessible toilets
- Whether you have seating around the venue for visitors to rest
- Areas that are accessed by steps
- Areas that are accessed by ramps or lifts
- Any areas that aren't accessible to wheelchair users
- How they can get hold of any Large Print leaflets or information sheets (provide these as online downloads if you can)
- Downloadable maps and floor plans



## Transport information

It's important that you clearly define access to your property or event on your website. Information should include:

- A location map
- Your site's full address, including a SatNav postcode of where to park (and a warning if SatNav tends to misdirect visitors!)
- Telephone number
- Directions if travelling by car, outlining parking provision whilst on site – this should include what provision you have for disabled parking
- Directions for cyclists – find out if your site is near a National Cycle Trail or local cycle route
- Detailed information about travelling by public transport, including bus and train routes and timetables – provide links to the websites of local and national transport providers so that visitors can work out their own journey

## Booking systems

If you are considering opening to the public and you are a small site with a limited amount of space, or if you are planning on holding special events, then you will need to think about how you will manage your bookings and take payment (if you are charging admission – for more on this, see **During their visit: Charging admission in Section 2**).

### ONLINE OR MANUAL?

Most people will expect to do this online, and this may well be the easiest way for you to manage your bookings as you can choose a service which will automatically do all the work for you.

You may choose to manage your bookings manually, by giving a phone number and email address, however this can be labour intensive – you need someone to answer the phone and the email account needs to be checked very regularly. Also, this method is much more open to human error – you may forget to take a phone number or not notice an email.

A key part of your decision will be payment method. Again, if you choose to do this manually you will need to have a credit card terminal or ask people to bring cash on the day, which they may find inconvenient and makes ‘no shows’ more likely. Choosing an online booking system takes all this out of your hands and makes the experience much easier for your visitors. Most booking systems will also enable you to publicise your event through their systems via the internet and social media.

### ONLINE BOOKING SYSTEMS

There are a number of popular websites which can be used to manage your bookings, including:

- Eventbrite
- Wegtickets
- Ticketsource

Research each option and search for others as fees vary and the size of your events and ticket price will influence the cost. You should be able to avoid paying a fee for your booking system if your event is free as most services provide a free option.

In order to make sure you can use the system effectively you also need to consider:

- The internet connection at your site. You will need to set up the event online, but some services also enable you to use an app on your phone to register people as they arrive by scanning their tickets. You will not be able to use some of these features if you have no internet connection. You will need a minimum of one device with an internet connection on site to use an online booking system effectively
- Additionally, your visitors may want to show you their ticket on their phone rather than bring a printed copy, so if this is not possible because of poor signal, you must make this clear on the booking confirmation
- Your website needs clearly to show how to book tickets. Most booking management services will allow you to insert a direct link from your website to the booking page (called a 'widget'). You must make it as easy as possible for people to book as people often give up if they are unsure what to do or find the process overly complicated

### SETTING UP AN ONLINE EVENT

It is very simple to set up an online event. For example, these are the steps you will need to follow to set up an event on the Eventbrite website:

- Go to [www.eventbrite.co.uk](http://www.eventbrite.co.uk) and click 'Get started'. The website will prompt you to set up an account and create a username and password which you will use to log in to the website in future, so keep a note of this
- Select 'Create Event'. This brings you to the first part of creating your event, called 'Edit'

#### Step 1: Event Details

- Add a title and select the location – choose a short, snappy title for your event and set the date and time
- Add an event image – remember you are trying to sell your event. So choose something engaging and interesting that will encourage people to click to find out more
- Share details and other important information about your event – you can view a list of frequently asked questions, such as 'what is the refunds policy' and choose any you would like to include with your own answer
- Add information about the event organiser

## Step 2: Create Tickets

- Create free or paid tickets – choose whether you want your tickets to be free or paid for and set the price for paid tickets. Here you will enter the number of tickets available and the price. You need to decide whether to absorb the fee yourself or pass it on to the visitor. For example, if the ticket price is £5 and the fee is £1 (the fee will be calculated based on the number of tickets you are selling and the price of each ticket), you could absorb this yourself, meaning you will receive £4 for every ticket sold, or pass it on to the buyer; meaning that the ticket price goes up to £6 and you receive £5 for every ticket sold. You will see the ‘buyer total’ shown below the ticket price box. This is the amount the visitor pays per ticket. By default, the website will add the fee to the ticket price, so if you want to absorb it you will need to click to change the setting. The fee is taken as part of the ticket sale, so you do not need to make any payments direct to Eventbrite
- Set the total capacity for the venue
- Add a donation ticket in order to collect voluntary donations from visitors
- If you are a registered business with a VAT registration ID you will need to enter the details here

## Step 3: Additional Details

- Mark your page as public or private – making the event public means it will appear in search engines and publicly on the Eventbrite website. This is the option you will most likely choose
- Choose an event type and topic – choose from categories such as festival, event, class and topics like history, gardening. This will make your event easier to find, so do choose some relevant options
- Show the number of tickets remaining (if you’d like) – if the event is likely to sell out you may wish to show the number of tickets remaining as this will give people a sense of urgency and make them more likely to buy
- Choose a design theme for your event – there are different template design themes you can choose from to improve the look of your event, but you can skip this step if you are happy with the basic theme – there is no real need to change this for most events
- Click ‘Make Event Live’ – your event is now open to the public! By logging back in to the website you can track sales and monitor progress

## During their visit

### TRANSPORT

There must be adequate arrangements made for dealing with traffic and vehicle access to your site, if appropriate, as well as the segregation of vehicles from pedestrian traffic.

The following should be considered when making your transport plan:

- traffic permitted on the site
- opening times
- road closures
- site closures to traffic
- emergency access
- parking
- pedestrian access
- signage
- public transport

### Traffic information and signs

You should provide sufficient signage, which should be securely displayed around the venue and on highways within a set radius of the venue. Consideration should be given to multi-lingual notices if appropriate. Historic buildings are eligible to apply for permanent 'brown signs', but visitor number thresholds apply and brown signs can be expensive. Find out more from your local highways department (for local roads) or Highways England (for trunk roads and motorways). See **Useful links** below.

### Permission for temporary signs

Temporary signs must be approved by either Highways England (motorways and trunk roads), your local council or Transport for London (all other roads). Do an internet search for 'temporary road sign permission', followed by the name of your local council, and read the guidelines and form for your area – there will be slight differences to the process, depending on the Local Authority.

If you intend to attach signs to lampposts you will also need to obtain permission from the electricity supplier. It is likely to take around four weeks for the Local Authority to process your application, so remember to plan for signage well in advance of your event.

## Timings and traffic

You should consider the date and start and finishing times of your event in relation to other local events and peak times for road users. If possible, you should try and organise your event in such a way that people will arrive and leave at staggered times rather than all in one go. You may want to consider advance warning signs if you expect large volumes of traffic, this will warn other drivers to avoid the area on the day of your event.

### Key signage issues to consider:

- Remember that signs on the highway are there to help people find the site, they are not there as advertising. They should not include a lot of text or be distracting, as this would be dangerous for drivers. Text should be large enough so that drivers don't need to slow down or cause queues to read them.
- Think about how far from the site the signage will begin, and ensure it is consistent from the first sign all the way to the site
- Always consider the safety of the person installing the sign and that of road users – think carefully about when and where you install signs and whether it is safe to do so. Ensure that the sign will not obstruct or confuse road users or pedestrians

## Event traffic management

At small events traffic management may just involve a few stewards, wearing high-visibility jackets, directing traffic within a defined parking area. For larger events, police assistance will be required to direct traffic on main roads, together with road signage for the event.

Additionally, arrangements should be considered to prevent pedestrians being dropped off on unsuitable verges, and safe pedestrian access via footpaths away from cars must be provided.

Consider setting up a temporary car park for one-off events, somewhere in the grounds or, by arrangement with the landowner, on an adjacent site within walking distance. For detailed advice on traffic management for events, see **Useful links** below.



## Useful links

Public events: traffic management guidance for event organisers

<http://www3.hants.gov.uk/trafficmanagement/public-events/events-guidance.htm>

Temporary traffic signs for special events

<https://www.gov.uk/government/publications/temporary-traffic-signs-for-special-events>

Highways England – to apply for a brown sign on a trunk road or motorway

<https://www.gov.uk/guidance/apply-for-brown-tourist-signs-on-roads-the-highways-agency-manage>

Department for Transport – Temporary Traffic Signs for Special Events

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/4393/4-11.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/4393/4-11.pdf)

## Charging admission

To charge or not to charge? It's often argued that people are happy to pay admission if the venue and the visitor experience are worth it. That won't come as a great surprise to anyone who's ever been a visitor themselves. Yet there are considerations that venues must take into account when deciding whether to charge admission and, if so, how much. This section provides a general overview of some of these.

A venue may have several reasons for charging their visitors for admission. Admission charges may be needed to cover:

- Opening costs – staffing, lighting, cleaning, public liability insurance etc.
- Development costs – planned improvements to the venue
- Conservation and restoration costs – saving heritage for future generations

The potential consequences of charging an admission fee include:

- Making the venue inaccessible to people on lower incomes
- Pushing down the venue's own earned income by reducing footfall through the shop and café if you have either

Start off at the 'mid to cheaper' range of the charge scale if you are opening to visitors for the first time, as dropping your prices later in order to turn around unsatisfactory visitor numbers will set off alarm bells for potential and existing visitors. Raising your prices in the future is always an option and, as long as they don't increase considerably in one go or within a short period, no alarm bells will go off for your current or potential visitor bases.

Having a range of admission charges demonstrates to the public that your venue is aware of and is taking into account its visitors' ability to pay, as well as encouraging people to visit who might otherwise be put off by the same admission charge for everyone.

The visitor categories you'll need to consider are:

- Adult
- Child
- Family
- Student
- Disabled

- Senior Citizen
- School
- Group
- Local resident

## BASIC GUIDELINES FOR CHARGING OPTIONS

### Adult

All venues charging admission charge a rate for adults. This is always the most expensive rate of all the visitor categories. However, careful thought needs to be given to just how much to charge this category, as you don't want to price yourself out of the market. Do some research into what the average adult charge is for venues of a similar type and size across the country.

The family ticket (see below) won't be a saving for every adult visiting with children (for example, one or two adults bringing one child).

Your adult admission charge combined with the child charge should not be too expensive for them. Any combination of adults visiting with children should be actively encouraged to do so by reasonable admission charges – they are one of the visitor categories most likely to make repeat visits to your venue.

### Senior citizen

Some organisations are moving away from having a separate rate for seniors and charge them the adult rate. The reason for this is that research suggests that some seniors now have more disposable income available for leisure activities than many working-age people. Some venues charging senior citizens the adult rate overcome the risk of excluding older people on low incomes by offering special senior rates on off-peak days, when there is lower footfall. Other organisations continue to include senior citizens in their concessionary admission rate.

### Child

Children's admission rates are quite often split into two age ranges:

- 5-16 years
- Under 5s

There has been a lot of debate about how much a baby or toddler actually benefits personally from a visit and whether they should be charged admission on

that basis. Most UK heritage venues let the under 5s in free of charge. This seems to make better PR sense in the long run, as families feel they are getting a good deal, don't have to leave the child with someone at home and are, therefore, more likely to make return visits. Everybody wins.

### Family

Families come in all shapes and sizes. To simplify this reality in ticketing terms, heritage venues generally define a family as:

- 2 adults + up to 3 children
- 1 adult + up to 4 children

Any extra children or adults in that group can be charged at the full rate. Some sites charge the same rate for both of the family examples given above, while others charge a different rate for each, in some cases to avoid discriminating against single parents on low incomes.

Avoid confusion and exclusion – don't use the word 'parent' when giving information about family tickets, as one or more of the adults might be "Another family member", "Carer" or "Guardian".

### Student

For students aged 16 years and over in Further and Higher Education, see Concessions.

For students 5-16 years in compulsory education, see Schools.

### Concession

Certain visitor categories are likely to be on low incomes and are, therefore, grouped together on the admission charge scale for a lower concessionary rate.

As a rule of thumb, some UK heritage organisations classify the following visitors as 'concessions' and may charge them a flat concessionary admission rate:

- students (over 16 years old, in full-time education)
- the unemployed
- the disabled

Many venues ask for proof of status to be shown, which should be made clear on your website and in all leaflets and marketing, to avoid embarrassing the visitor or the staff or volunteers on the admission desk. The admission rate charged by UK heritage venues for concessions is roughly 70-90% of their adult rate. Bear in

mind that the visitor types listed here probably won't have cash to spare – if your admission rate is too high for them, unlike many visitors in the other categories they really won't have a choice about visiting you or not.

By offering a reduced charge for people on low incomes you are more likely to increase visitor numbers over all.

### Schools

Schools are an audience category that actively visit heritage venues in support of the National Curriculum. Moreover, evidence suggests that school visits encourage follow-up visits by pupils' families. The usual minimum number of students in a school group is 30 (the average class size).

By law, schools must provide a minimum of one adult accompanying every eight children on trips off school grounds. Heritage venues quite often allow free admission to the class teacher as well as a specified ratio of adults to children brought by the school; that could be 1:8 (one adult to every eight children) or even higher. Think of it this way – the more adults accompanying a school group, the better the children will be managed, which is good for all your visitors (and your staff and volunteers too).

The rate of admission for school groups varies dramatically across venues, usually based on the amount and quality of activities and resources, and whether their visit is led by your staff and volunteers or self-guided. School visit numbers are hugely sensitive to teacher-to-teacher feedback about value for time and money.

Once you are very clear about what schools will be offered during a visit to your venue, do some research online or make some calls to find out what other venues provide in the way of activities and resources and what they charge. You could just charge for admission per child to the site and add an extra cost per child for any extra activities, so that teachers can pick and choose to tailor a visit to their needs and budgets.

Once you have an admission rate in mind, it pays to run it by local schools to see whether they would pay that amount to visit you, before you launch it.

The Historic Houses Association (HHA) provides a free specialist education advisory service for members (see **Useful links** below).

### Groups

Like families, groups come in assorted shapes and sizes, but the most common are:

- Organised coach trips (most commonly senior citizens and tourists)
- Classes of students in Further and Higher Education
- Friends or families on a big day out together
- Community groups (including Brownies and Scouts)

The simplest way to work out admission charges for groups is to calculate a discounted rate for each of the categories the individual visitor within a group would come under if they were visiting on their own:

- Adults
- Child
- Concession

You'll also need to decide how many visitors constitute a group. Again, this varies considerably across venues, but the average is 10+ people.

### Local residents

You can always charge admission for a special event or exhibition, whether or not your venue charges admission to the site in general.

Developing a sense of shared ownership and responsibility for the heritage of your site within your local community can be an important part of opening to the public.

Some heritage venues offer local residents unlimited free admission or special free admission weekends to help develop strong links with their local community. If you decide to do so, you might issue a Resident Pass card, which you can advertise on your website and in the local press and online. Alternatively, a visiting local resident could prove their status with ID showing their address. What you define as a 'local resident' could be anyone living within a specific number of miles' radius of your site or people living within a council boundary.

If no charge is a step too far, you might still consider offering a special discounted admission charge for local residents.

Admission charges should be set so as to encourage sales in the café or shop or voluntary donations. If visitors feel they've got a good price for admission, they're more likely to spend more in your shop or café and visit satisfaction rates will be higher.

## NOT CHARGING ADMISSION

Some venues choose not to charge admission. Reasons may include:

- The time and work needed to plan and prepare for charging are not considered to be worthwhile for the amount of time the site will be open to visitors
- The owners/organisers may want to 'test the waters' of opening to the public for the first time and to keep things simple, with a thought to charging if they decide to open again in future
- The owners/organisers may not want to have to go to the trouble of declaring and paying tax on any admission revenue
- The owners/organisers may want to reduce financial barriers preventing people on low incomes from visiting

### Free admission

The benefits of not charging admission may include:

- Larger numbers of visitors
- Visitors have more money to spend in your shop and café
- People on low incomes are more likely to visit
- Visitors may want to make a donation to show their appreciation

The potential disadvantages of not charging admission include:

- Large numbers of visitors
- Loss of income to develop and provide quality resources and attractions to encourage return visits
- Loss of income to repair and maintain visitor areas

### Donations

If they've been well looked after by your staff and volunteers, enjoyed the venue and its stories and had a great day out (for guidance and ideas, please read the separately provided, in-depth **Appendices A – Volunteers, B – Interpretation and C – Audience Development**) – visitors might want to express their appreciation by making a donation as they leave. Give them the opportunity to do this with attractive donation stations. Heritage venues using this system will often provide a transparent donation station, as seeing money already given by other happy visitors stimulates further visitor generosity.

If your site is a charity it can claim Gift Aid from admission charges. If a visitor is a UK taxpayer paying for themselves and/or their family group to enter your venue, they can choose to make a Gift Aid donation. This allows you to reclaim the tax the visitor has already paid at no cost to them – that's 25p back to your site for every £1 of the admission price. Gift Aid is an easy and tax effective way for visitors to support your charity.

### **Paying a suggested charge**

Rather than paying a mandatory admission charge, visitors could be invited to pay a 'suggested charge'. This method is more up-front than charging higher prices in the shop and café to compensate for supposedly free admission. A small contribution made often, by many, could go a long way.

Do be aware that if introduced to generate a predicted income for your venue, this system will need to be 'enforced' by making visitors pass through some sort of staffed boundary. This might leave some people feeling embarrassed and a little resentful, making it less likely that they'll return.

Always explain to your visitors, on notices at the admission point or donation station or on a flier with their ticket, what work or resource their contribution is supporting. That might be, for example, the provision of educational resources and sessions about Capability Brown's design of the grounds for visiting primary schools, or the work of restoring some element of Brown's original design.

Explaining where their money goes makes visitors feel valued by your site and feel good about themselves for helping a good cause.

### **Useful links**

GiftAid

<https://www.gov.uk/donating-to-charity/gift-aid>

Free specialist education advisory service for members (Historic Houses Association)

<http://www.hha.org.uk/learning-and-outreach-2/learning-advisory-service.html>



## Facilities

The most successful visitor venues are those that put visitors first and make them feel safe and welcome.

Apart from the fact that a satisfied customer provides the best form of publicity (free) for your site, for long-term success a venue should always consider its relationship with its visitors in terms of the services and facilities it offers them. Different types of visitor might have different needs and expectations.

If there are places you've visited that stick in your memory as a fantastic trip, that still make you smile long after you've left, ask yourself what they provided that made the trip so positive. Could you offer your visitors the same?

Put yourself in your visitor's shoes. What do they want to see or do at your venue? What do they need for their comfort and safety? What facilities do they need or expect as a minimum? What would put them off coming back?

## WHO ARE YOUR VISITORS?

- Families?
- Children?
- School groups?
- Adult groups?
- Older people?
- People with disabilities?
- Tourists?
- People with no English or English as a second language?

## Size doesn't matter

It really doesn't matter to visitors how small your venue is. What they will notice, consciously or subconsciously, is the thought that you've given to their comfort and convenience.

## Key facilities you should consider:

- Benches or chairs to sit down and rest
- Facilities for visitors with disabilities
- Changing facilities for parents with babies

- Staff or volunteers who can provide full information about the venue and what it offers
- Things to engage younger children
- Refreshments
- Clean and pleasant toilets
- Souvenirs
- Parking

### TEA AND TOILETS

However fabulous their gardens and interiors might be, visitor venues can rise or fall on whether they offer a cup of tea and clean, attractive toilet facilities. Visitor satisfaction really does come down to basic human comforts.

With a little imagination and at relatively small cost you could provide your visitors with some sort of refreshment. If you've not offered any before, it's sensible to build up your refreshment services gradually. You'll need a licence to sell food (see **Useful links** below).

You could start by providing an attractive coffee and cake stall with some chairs and tables. Find an external company to provide this for you, including the staff. Your profits might be low from this sort of set up, but you'll be increasing your visitor satisfaction rating without using a lot of resources – visitors don't care who owns the cakes as long as they can buy one.

### Café

You might decide to provide a café. The café is an important part of everyone's visit. It should include the right facilities for families with children and a range of good-value kids' food and drinks, with healthy options. Family-friendly furniture is important too. Reasonably-priced high chairs for babies and toddlers can be bought from shops like IKEA. These ingredients all contribute to the comfortable feeling families want to experience when they come to your café to sit down, relax, grab a bite and have a chat. Your effort will pay off with repeat visits.

Families will return to a venue they know they can rely on to provide good food and drink options and facilities for the kids.

Cafés require appropriate facilities and food preparation areas, which may require planning permission. Food safety legislation must be adhered to and new food businesses must be registered with environmental health at the local authority

well in advance of opening. How will you deal with and notify customers of allergens? How will you accommodate visitors with specific dietary needs? You will find information about this on the Food Standards Agency website (see **Useful links** below).

Careful thought should be given to profit margins – you don't want to be out of pocket at the end of the season. How are you planning to staff the café? Will you employ people directly or contract the catering services out?

If you provide refreshments and somewhere to sit and eat them, toilets must be made available nearby.

### Toilets

Even if you don't have a café, if you want visitors to stay for more than half an hour (particularly if they're elderly or bringing children) you'll need to provide adequate toilets for them.

By law you must provide accessible toilets for disabled visitors. To save on costs or space, accessible toilets and non-accessible toilets can be combined, as long as they are located where a disabled visitor can actually get to them (e.g. if they're not on the ground floor there will need to be lift or ramp access).

Any public venue worth its salt has baby changing facilities, including nappy disposal bins. Even better if both dads and mums can access the facility to change their baby.

If the baby changing facility is situated in the women's toilets you'll force dads to change baby wherever they can find a flat surface – not nice for dad, baby, or your other visitors.

Toilets, wheelchair-accessible toilets and baby-changing facilities should be clearly marked on maps and/or floor plans as well as signposted around the site.

Provide toilets at as many locations around your site as you can. Older people and families with young children will thank you.

Believe it or not, there is a Loo of the Year Award for toilet facilities in public venues. Award winners benefit from national media coverage. How delightfully British!

## SHOP

A gift shop or sale point on your site will give you more opportunities for generating additional revenue. Your visitors will be looking for chances to buy gifts and souvenirs as part of the day, so why disappoint them and lose income for yourself? Many shops on heritage sites are staffed by volunteers. If you do have space for a retail outlet, it's well worth visiting a few examples at other venues to get ideas for good design and layout (or for what doesn't work well). Get professional advice if you can.

Consider joining an organisation such as the Association of Cultural Enterprises (ACE), or the British Shops and Stores Association, which specialises in small to medium-sized, non-food shops.

Things to consider:

- Might there be any tax implications for your organisation?
- How will you manage and staff your shop and ensure that your visitors are met with excellent standards of customer service?
- How will you ensure the security of your merchandise and takings?
- Where will you locate the shop?
- Will it be easy to find and well sign-posted? How will you fit out the shop?
- Will you need to buy in fixtures and fittings?
- Might you need to apply for planning permission?
- What do you want to sell in your shop?
- Who will supply/manufacture the merchandise? How will you manage stock control and accounts?

The Association of Independent Museums (AIM) has produced a comprehensive guide on successful retailing for small museums, which answers and provides advice on many of these questions and can be applied to heritage sites (see **Useful links** below).

## Location and design

Your shop's design should keep the following in mind:

- Sales
- Security
- Customer convenience
- Wheelchair access

The best spot for your shop might be the exit. Most sales are made at the end of a visit – people don't want to be carrying things around. They'll also spend more if they're already enjoying themselves. The shop's location will depend on staffing resources, so you might find that it has to go at your combined entrance/exit point. If so, take care that visitors aren't put off their shopping time by other visitors leaving and arriving through the shop area.

Encourage the use of the shop in its own right if you can – visitors to the shop alone can be an important source of additional income.

If visitor numbers to your site are less than 10,000 per annum, a simpler arrangement to a full shop may be preferable; for example, a small range of items could be sold in conjunction with either admissions or teas. For smaller sites or those that open to the public infrequently, this option is capable of generating a quite high per-head spend without the investment in capital, stock and management time.

## Stock

Shop stock can be made up of items produced on behalf of your venue or bought in. Most items should have an obvious link to the identity, history and location of your venue. Items produced specially for your venue, particularly those bearing a name or logo, are a simple way to market your venue to other potential visitors if they're given as gifts.

Good design and good quality are important – the things you sell in your shop reflect your site.

Different visitors will have different requirements and spending power and the kind of things you stock should reflect this. There are, commonly, three key groups that heritage shops fail to cater for at their peril:

- school groups
- families (parents or grandparents with young children)
- adults (typically couples) with no children or with grown-up children

Build your stock up gradually to allow time to find out what sells and what doesn't.

### EXTERNAL FACILITIES

You may be reading this thinking that your venue doesn't have the resources or the space to provide particular services or facilities to your visitors.

You might be right (although do keep an open mind and look to see whether there are ways round the issue), but is there anything stopping you from providing a map, leaflet or section on your website explaining where the nearest restaurant/pub/parking is? You could even develop a mutual discount voucher scheme with another local business.

Whether or not you provide refreshments or toilets, your visitors are going to ask about them over and over again, so why not be prepared with constructive suggestions and leave your visitors feeling cared for?

If your visitors feel well looked after they'll keep coming back.

## Useful links

### Cafes:

Food business registration (Food Standards Agency)

<https://www.gov.uk/food-business-registration>

Food hygiene (Food Standards Agency)

<http://www.food.gov.uk/business-industry/food-hygiene>

Food Standards Act (1999)

<https://www.food.gov.uk/enforcement/regulation/foodstandardsact>

Regulation and legislation (Food Standards Agency)

<https://www.food.gov.uk/enforcement/regulation>

Starting a food business (Food Standards Agency)

<https://www.food.gov.uk/business-industry/startingup>

Guide to Successful Museum Cafes (AIM)

<http://www.aim-museums.co.uk/downloads/f614a8af-b18e-11e2-b572-001999b209eb.pdf>

Catering and cafes (Museum Practice)

<http://www.museumsassociation.org/museum-practice/12775>

### Toilets:

Loo of the Year Awards

<http://www.loo.co.uk>

### Shop:

Guidance on museum shops (AIM)

<http://www.aim-museums.co.uk/downloads/f897e21b-b19c-11e2-b572-001999b209eb.pdf>

16 top tips for making the most of your museum shop (The Guardian)

<http://www.theguardian.com/culture-professionals-network/culture-professionals-blog/2012/oct/18/top-tips-museum-shop-retail>

Retail advice and case studies (Museum Practice)

<http://www.museumsassociation.org/museum-practice/retail>

## Signage

Signs give information about direction, location, safety or something the visitor needs to do. They are crucial for an accessible visitor venue. This information will dramatically reduce the number of your visitors getting lost or feeling tired and generally feeling unsafe and not looked after.

All visitors should be able to use the signage around your site easily, including visitors with disabilities.

Good signs are:

1. Clear
2. Concise
3. Consistent

Bad signs are:

1. Too small
2. In the wrong place
3. Hard to read

There are three steps for creating good signage for your venue:

1. Planning
2. Design
3. Management

## PLANNING

Signs can be divided into types:

- Information – e.g. labels, displays, explanations, times, dates, prices
- Direction (nearly always text with arrows)
- Location identification – e.g. identify an area, room or facility
- Mandatory fire and safety signs (most are specified by a British Standard)

A good signage system works in conjunction with orientation clues, such as memorable objects or features that help make finding key destinations clear.



Key destinations might include:

- The approach from the road
- Car parking
- Public transport drop-off points
- Entrances and exits
- Admission desk
- Stairs and lifts
- Exhibition spaces
- Cafe, toilets and cloakroom
- Shop
- Fire exits

### DESIGN

Vital elements to consider during the design phase:

- Language
- Typeface
- Type size
- Layout
- Colour and contrast
- Symbols and icons
- Braille and embossed information

### Clarity

Visitors need clear information in simple language. If messages are too complicated, people get frustrated and confused.

Watch out for:

- wording and punctuation
- consistent terminology
- too much information
- too much punctuation

Typeface on signage needs to be legible and uncomplicated. 'Sans serif' typefaces are the easiest to read.

## Positioning

Position guidelines:

- The average person's eye-line is 1400mm-1700mm above floor height, so signs read at close range, e.g. signs on doors, should be mounted within this range
- Signs that are read at medium range must be positioned high enough not to cause an obstruction – 2300mm from floor level to the bottom of the sign works well
- Signs that are read at long distance should be positioned so that objects between don't get in the way of the viewer

You don't need to spend a lot of money to create good signage yourself, although if you plan to print your own signs then purchasing a laminator would be a good investment.

## Maintenance

Someone should have responsibility for making sure your signage stays where it's supposed to be and is kept clean and in good condition (signage can fade quickly in direct light, particularly near windows and outdoors).

## After they leave

### BUILDING RELATIONSHIPS

#### Listen to feedback

Knowing your existing and potential audiences, identifying their needs and motivations and understanding where things could be improved, is the first step in delivering a better experience for all visitors and building long-term relationships with your community. When you are trying out something new at your property or taking part in a large-scale project like the Capability Brown Festival, feedback from your visitors, volunteers and others involved in the activity will enable you to learn what worked well and why, and how to build on the experience. **Appendix E – How are we doing?** (provided separately to support this manual) offers helpful guidance on how to evaluate your activity.

Even if your site is small and/or has very limited opening, it's worthwhile collecting feedback from visitors, however few they might be. Feedback helps you to measure whether your opening was worth the time and effort, and what you might add/change should you decide to open again in the future. It might also flag up areas for which you could apply for a development grant. Feedback can be collected in very informal ways that don't require a great deal of planning, a team of staff/volunteers or involve external services; including having a friendly chat with your visitors as they reach the end of their visit or providing a comments book for them to write in.

Don't just build relationships with people on your doorstep, but relationships with audiences that come from further afield. This could be out-of-district community groups, domestic day-trippers or group travel operators. Link with your local tourism agency for more details (see **Useful links** below).

#### Identifying new audiences

The heritage that your site represents might be of particular interest to certain groups. Developing a relationship with these people may be a good place to start if they are from groups that don't currently visit much, or at all.

Audience development is an ongoing process, not a one-off exercise. See it as an important step towards achieving your site's broader goals.

Different types of heritage attract different audiences. However, research consistently reveals that some groups are less likely to visit heritage sites than others.

These groups often include:

- older people with mobility, transport or financial barriers (e.g. people who live in care homes).
- young people
- families with mobility, transport or financial barriers
- people with lower educational attainment
- people from Black, Asian and minority ethnic communities (BAME)
- disabled people
- people in lower socio-economic groups and on low incomes

Use the Taking Part survey and Audience Finder data to find out what % different types of visitor attend heritage sites (see Useful links below).

See the Department of Culture, Media and Sport's Taking Part survey on participation in cultural activity in England for further information (see **Useful links** below).

Looking at the list of groups above, ask yourself these questions:

- Which of these groups are visiting currently?
- Which groups are not visiting currently?

### Increasing visitors

In order to increase the number of visitors for each of your 'currently visiting' and 'not currently visiting' group lists you'll need to carry out audience research to find out more about them. You'll need to find out their wants and needs, and attitudes towards heritage and your venue to make sure you can meet them.

Census information on the internet provides information about the characteristics of people in your area.

To find out who is not visiting you, compare the results of your surveys and other visitor research with the characteristics of your local community. Local census data can help with this (see **Useful links** below).

It can be useful to compare your results with similar venues or with national surveys to identify visitor gaps.

## AUDIENCE RESEARCH

As a starting point for any audience research, ask yourself:

- Which audience group(s) are we targeting?
- What is it that we need to know about them?
- How are we going to use that information?
- What is the incentive for people to take part in our research?

Use your answers to draw up a list of clear aims for your audience research – what do you want to know and why?

Your answers will determine the questions you ask people and how you ask them.

Depending on what it is you are trying to find out about existing and potential visitors, there are two basic types of information you can collect:

1. Quantitative – will give you numbers and provide an overview: how many people think or do something; demographics; numbers; satisfaction ratings
2. Qualitative – can reveal more in-depth information: the range of views; the reasons behind visitor behaviours; why people do and think things; attitudes; feelings; ideas

## Ideas for collecting visitor information

### Surveys

Surveys can be carried out on or off site, for example:

- During or at the end of a visit to your venue
- An online survey on your website
- On local high streets and in shopping centres
- At workshops or meetings (e.g. local residents' association)

To create a list of questions, use the aims you have listed (see above) as a springboard to identify what it is that you want the survey to find out. There isn't a standard list of "useful questions" for visitor surveys as each venue is unique. The questions you ask visitors should help you with future decision making and planning.

## TripAdvisor and visitor websites

It's always useful to collect data from visitors about their expectations of your venue and whether or not these were met during their visit. Local and national visitor websites such as TripAdvisor, where visitors provide personal feedback about venues for other potential visitors, can be goldmines for audience research information.

### Managing negative feedback

On occasion you may receive critical and/or negative feedback from visitors. Regardless of whether you feel these comments are justified or not, there are practical steps you can take to manage such situations when they arise:

- Respond promptly – this demonstrates that you value all feedback and that you are serious about offering excellent customer service.
- Put the record straight – should the visitor have made a factual inaccuracy in their feedback, or if you have evidence that the critical comments are unjustifiable, say so.
- Demonstrate that you are listening – where visitor comments made in feedback have prompted you to make changes and address issues on site, tell your other visitors what you've done.
- Be polite and professional – assert your perspective on the situation calmly and with courtesy. An aggressive or defensive response has the potential to damage your own and the site's reputation.
- Be gracious – always thank the commentator for their feedback. Apologise for any specific problems experienced by the visitor and state how you have (or will) resolve their concerns.
- Accentuate the positives – flag up any positive remarks made in their feedback and advise the visitor of any planned changes and improvements that might encourage them to return in the future.

The website TripAdvisor provides detailed guidance on managing negative feedback from visitors (see **Useful links** below).

Even negative visitor feedback is valuable. It helps you identify where the work needs to be done.

### Advisory panels

A tried and tested method for gaining visitor opinions is to create a panel that represents key target audience groups such as schools, families and people with disabilities.

This model makes it easy to ask key audience groups about issues directly affecting their experience of your venue or preventing them from visiting. Panels can be invaluable for testing out new programmes and ideas as well as helping to create content for exhibitions, visitor leaflets and printed material as well as your website and social media profile.

To recruit panel members, display posters at your venue and on your website, in community venues such as local libraries, or post on social media. For an access panel, approach disability organisations in your local area.

## **WHAT DO WE DO WITH COLLECTED INFORMATION?**

Don't fall into the habit of collecting data for data's sake or, before you know it, you'll be drowning in unused questionnaires. Refer back to the aims you identified and review them regularly.

### **How do we manage collected information safely?**

#### The Data Protection Act (1998)

All personal data collected, from visitors, on surveys, from your staff and volunteers, is protected by law. The Data Protection Act (1998) controls the collection and retention of personal information, be it gathered from visitor surveys and mailing lists, from your staff and volunteers, or from your suppliers. The Act applies to any organisation that handles personal information.

The Data Protection Act gives individuals the right to request that companies and organisations provide them with details of the personal information they hold about them, usually within 28 days. This information can only be withheld from individuals in very specific circumstances, which are unlikely to relate to heritage organisations and historic houses (for example, in the course of a criminal investigation). Misuse of personal information held on file may result in investigation and legal action.

#### How does the Act affect us?

- When gathering information from visitors and employees (including volunteers), it's a legal requirement to state how this information will be used and shared, how it will be stored and for how long.

- Staff and volunteers who handle this information should receive appropriate data protection training.
- This information should be kept securely – consider using encryption for data held digitally.

For advice on ensuring that data protection legislation is met, see the Information Commissioners' Office advice for not-for-profit organisations, charities and voluntary groups (see **Useful links** below).

### **BUILDING PARTNERSHIPS**

Ever considered building some kind of mutually beneficial partnership or other working relationship with a local organisation or business? Such relationships could help you meet some of your site's objectives as well as develop better relationships and recognition for your site within your local community. Just remember that building rewarding relationships will mean thinking about more than your own needs and what you expect to gain.

"Start from the point of what the people you want to work with are doing and what you do can help them, that's one way to get people's interest and attention. It's about understanding what their priorities are, rather than trying to persuade them that your priorities are theirs, because that will never work."

- Virginia Tandy, Director of Culture at Manchester City Council

### **Partnership ideas**

- Here are some ideas for mutually beneficial partnerships:
- Work with your local National Volunteer Centre and colleges to create volunteer opportunities with your site
- Work with secondary schools to create Work Experience placements for Year 10 students
- Work with a local printing firm to sponsor the production of a leaflet
- Offer local companies corporate 'away days' or staff volunteer days at your venue in return for useful services



### Love your local cabbies

Do your local taxi drivers know how to find your venue? Get in touch with local taxi firms or your local council, who are likely to have a list of registered taxi firms, and invite their drivers to bring their families to your venue for a free day out. In return ask them to promote you to their customers by giving them your leaflet.

Make use of your existing networks, for example, be sure to register your events on the Capability Brown events page and with Heritage Open Days (see Useful links below). People who are interested in this kind of event or venue will already be looking on these websites so make sure they know about your event.

### Useful links

Government advice on Data Protection for businesses

<https://www.gov.uk/data-protection-your-business/overview>

UK Census data

<https://census.ukdataservice.ac.uk>

Free national audience data and development tool (Audience Finder)

<http://audiencefinder.org>

Visitor Survey Toolkit – VisitScotland

<http://www.visitscotland.org/pdf/Visitor%20Survey%20Toolkit.pdf>

Using Surveys to Benefit your Business – VisitEngland

<https://www.visitengland.com/biz/advice-and-support/businesses/understanding-your-markets/using-surveys-benefit-your-business>

Managing negative feedback (TripAdvisor)

<https://www.tripadvisor.com/TripAdvisorInsights/n2428/how-add-management-responses-tripadvisor-traveler-reviews>

Department of Culture, Media and Sport's Taking Part survey on participation in cultural activity in England:

<https://www.gov.uk/government/collections/taking-part>

Data Protection Act (1998)

<http://www.legislation.gov.uk/ukpga/1998/29/contents>

For advice on ensuring that data protection legislation is met  
(Information Commissioners' Office)

<https://ico.org.uk/for-organisations/charity>

Find a local community support group or organisation

<https://www.gov.uk/find-a-community-support-group-or-organisation>

Volunteer Centres

<https://www.ncvo.org.uk/ncvo-volunteering/find-a-volunteer-centre>

Apply for funding for community projects (including volunteer programmes):

<https://www.gov.uk/apply-funding-community-project>

<https://www.hlf.org.uk/looking-funding/what-we-fund/community-heritage>

Brownies

<http://www.girlguiding.org.uk/brownies>

Girl Guides

<http://www.girlguiding.org.uk/home.aspx>

Beavers, Cubs and Scouts

[www.scouts.org.uk](http://www.scouts.org.uk)

TripAdvisor

<https://www.tripadvisor.co.uk>

Capability Brown events

<http://www.capabilitybrown.org/events>

Heritage Open Days

<http://www.heritageopendays.org.uk/get-involved/register-with-us>



Templates

## Template A – Risk management

VENUE NAME:									
<b>Risk Assessment</b>									
Ref no	Hazard	Persons at risk	How they may be harmed	Control measures in place	Current risk level	Further controls	Action by	Action by date	Completed by
<p>Assessment written by:</p> <p>Date reviewed:</p> <p>Next review date:</p>									

### **Template B – Event management planning**

This template can be used to plan and manage events of any number, type and size. Whether your site is opening for the first and only time, or opens several times a year, the blank template provided below is ready to use straight 'off the shelf'.

Don't feel you have to fill in every field or section of the template for a particular event you're planning. However, using the same template for all event planning will help you to manage information more efficiently, ensure; no detail gets left out of the planning by mistake and allows you to compare the scale and scope of events across your programme and over periods of time.

## Event management plan – blank template

### 1. EVENT PLACE & TIME

Name of Event: \_\_\_\_\_

Address of Event: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Details of Venue: \_\_\_\_\_

\_\_\_\_\_

Details of how your event will run, including details of all activities:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Estimated Number of People expected to attend: \_\_\_\_\_

Date and Time Set Up Commences: \_\_\_\_\_

Date and Time Event starts or is open to the public: \_\_\_\_\_

Date and Time Event Finishes: \_\_\_\_\_

Date and Time dismantling commences and anticipation conclusion time:

\_\_\_\_\_

\_\_\_\_\_

**MULTI-DAY EVENTS ONLY TO COMPLETE THIS SECTION**

Day 1 Start: \_\_\_\_\_ Finish: \_\_\_\_\_

Day 2 Start: \_\_\_\_\_ Finish: \_\_\_\_\_

Day 3 Start: \_\_\_\_\_ Finish: \_\_\_\_\_

Day 4 Start: \_\_\_\_\_ Finish: \_\_\_\_\_

Day 5 Start: \_\_\_\_\_ Finish: \_\_\_\_\_

Day 6 Start: \_\_\_\_\_ Finish: \_\_\_\_\_

**Activities during the day**

Activity 1

Start: \_\_\_\_\_ Finish: \_\_\_\_\_

Activity 2

Start: \_\_\_\_\_ Finish: \_\_\_\_\_

Activity 3

Start: \_\_\_\_\_ Finish: \_\_\_\_\_

Activity 4

Start: \_\_\_\_\_ Finish: \_\_\_\_\_

Activity 5

Start: \_\_\_\_\_ Finish: \_\_\_\_\_

## 2. EVENT MANAGER DETAILS

### Event Manager:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone (Work): \_\_\_\_\_ Phone (Home): \_\_\_\_\_

Email: \_\_\_\_\_

### Contact During Event:

Phone: \_\_\_\_\_ Mobile: \_\_\_\_\_

### Back Up Event Manager:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone (Work): \_\_\_\_\_ Phone (Home): \_\_\_\_\_

Email: \_\_\_\_\_

### Contact During Event:

Phone: \_\_\_\_\_ Mobile: \_\_\_\_\_



### 3. INSURANCE DETAILS

*A copy of your Certificate of Public Liability insurance should be included with this form.*

Name of Insurer: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Policy Number and Expiry Date: \_\_\_\_\_

Public Liability Value and Asset Value: \_\_\_\_\_

## 4. EVENT BUDGET

	BUDGET	ACTUAL	VARIANCE	VARIANCE
	Year beginning	Year ended	£	As a %
Item	£XX, XXX	£XX,XXX		
<b>Income</b>				
Individual Donations				
Gift Aid				
Grants				
Trusts & Foundations				
Ticket Sales				
Merchandising				
Sponsorship				
Bank interest				
<b>TOTAL INCOME (A)</b>				
<b>Expenditure</b>				
Overheads				
Administration				
Office rent				
Telephone, fax				
Postage				
Bank charges				
<b>SUB-TOTAL 1</b>				

	BUDGET	ACTUAL	VARIANCE	VARIANCE
	Year beginning	Year ended	£	As a %
Item	£XX, XXX	£XX,XXX		
<b>Artistic or Activity Costs</b>				
Artists Fees & Expenses				
Instrument hire				
Education programme				
<b>SUB-TOTAL 2</b>				
<b>Event Site Costs</b>				
Marquee hire				
Portaloos hire				
Casual festival staff				
Insurance				
<b>SUB-TOTAL 3</b>				
<b>Marketing Costs</b>				
Advertising				
Leaflet/flyer print				
Programme				
Mailouts				
PR consultant				
<b>SUB-TOTAL 4</b>				
<b>TOTAL EXPENDITURE (B)</b>				
<b>(B = Sub-totals 1 + 2 + 3 + 4)</b>				
<b>SURPLUS / (DEFICIT) A - B</b>				

## 5. VENUE HAZARDS

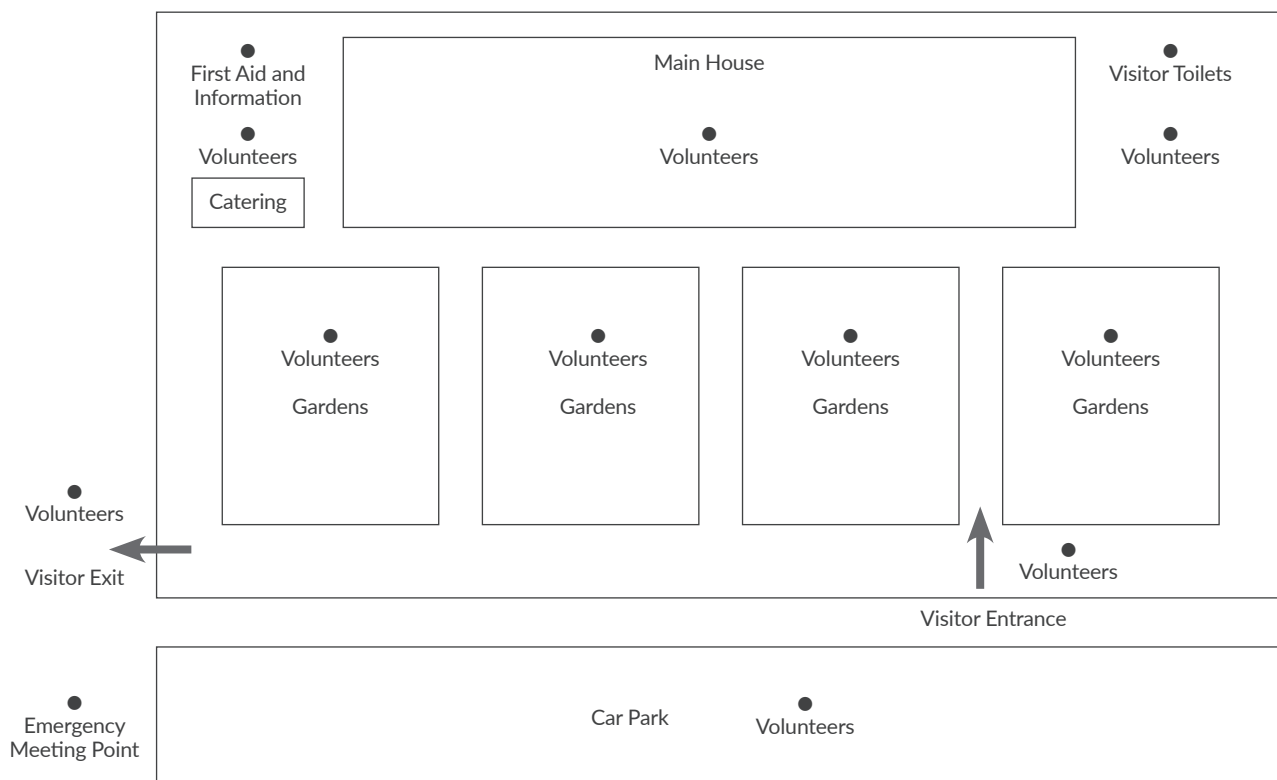
This is a short version of your overall Risk Assessment (see TEMPLATE A for a sample Risk Assessment Template from Burghley).

[illegible]

## 6. SITE PLAN

This is a physical layout of your site. It can be hand drawn or laid out roughly on the computer, but it should show all the key areas of your site being used during the event. These include:

- Entrances
- Exits
- Emergency Points
- Parking
- Toilets
- Visitor facilities
- Catering
- Retail
- Activity areas
- Information checkpoints
- First Aid point
- Key staff and volunteer points



## 7. PLANNING FOR WHAT COULD GO WRONG

It's good practice to think about what could go wrong and how you and your team will manage it. This could include: rain, too many people, not enough volunteers, artist / activity leader doesn't arrive. Please insert your own plans into the table below:

[illegible]

## 8. TRAFFIC AND TRANSPORT MANAGEMENT

Has a Traffic Management Plan been developed for this event?

YES / NO

(Please see During their visit: Transport in Section 2 for additional guidance on developing this part of your event plan.)

Is there car parking for:

	Yes	No	N/A
Emergency Vehicles			
Key Stakeholders			
Disabled Visitors			
General Parking			
Overspill			
Buses			
Taxis			

Who is stewarding the car parking? \_\_\_\_\_

Have the parking stewards had appropriate training? \_\_\_\_\_

### Managing Road Closures

Do you require any roads to be closed for the event:

YES / NO

If yes, contact your local authority for details on exact procedures.  
The following basic information will be required.

Street in which function is to be held: \_\_\_\_\_

Section to be closed: \_\_\_\_\_

Date of proposed closure: \_\_\_\_\_

Time of closure: \_\_\_\_\_ Time of re-opening: \_\_\_\_\_

The following documentation may also be required:

- A public liability policy of at least £10m to cover the event
- Evidence of notification of proposed road closure to emergency services

Permit received:

YES / NO

### Adjoining Properties

Have adjoining property occupants been contacted  
regarding the proposal of this event

YES / NO

How and when \_\_\_\_\_

If the event is likely to impact in any way on these adjoining properties –  
e.g. noise, extra cars, road closures it is highly recommended that you contact the occupants  
well in advance of the event.



## 9. SAFETY PLAN

### Event / Incident Control Centre

All event organisers and staff need to be in contact throughout the event through the Event/Incident Control Centre. Organisers may have a representative at the Event / Incident Control Centre to facilitate the provision and dissemination of information.

Event organisers must be able to communicate with the crowd both for public announcements and in emergencies. These areas must be accessible to ambulances and other Emergency Service vehicles.

### Incident Management Plan including First Aid Arrangements

The event must have a formal, written Incident Management Plan. The plan should be provided to all event organisers, key stakeholders, police and emergency service personnel. Local Emergency Service personnel should be contacted **at least two months prior to the event**.

The plan should include:

- Detailed First Aid arrangements for on-site emergencies not requiring outside help;
- Who are the events first aid officers? Who will provide first aid?
- Will the local ambulance be in attendance?
- Incident forms
- Who is the local contact for the Police? Have they been contacted prior to the event?
- Who is the local contact for the Fire Service? Have they been contacted prior to the event?
- Who is the contact for the local Ambulance Service? Have they been contacted prior to the event?
- Who is the contact for the local Hospital? Have they been contacted prior to the event?
- Specify arrangements to request further police and other emergency services assistance
- Identify meeting points for emergency services Identify contact details for local ambulance service Include details of local hospitals
- Identify access and egress routes
- How will communication be conducted on the day?

**Note:** In any major incident, for the purposes of the law, the venue is considered a crime scene and thus under total control of the police.

### **Incident Management Contact Details**

Who will be the designated contact people for any incident?

### **Fire Fighting Equipment**

Will portable fire protection equipment be strategically located throughout the venue for initial attack of the fire by the public and/or safety officers?

### **Lost and Stolen Property / Lost Children**

What arrangements have been made for lost or stolen property and lost children?  
Show location on site map.

# Incident Reports Template

All incidents are to be recorded in the following format:

Name of Event: \_\_\_\_\_

Event Manager: \_\_\_\_\_

[illegible]

## 10. PUBLIC HEALTH

### Temporary Food Stalls

The event organiser is required to advise their local authority when temporary food stalls will be utilised and temporary event licenses are required for the sale of alcohol. Food stall operators are likely to require individual approval from the council, so it is a good idea for event organisers to be aware of the requirements in their area. Details of the food businesses and type of food being provided at the event is essential.

### Toilets

The number of toilets to be provided will depend on a number of factors including:

- anticipated crowd numbers
- the sex of patrons (women require more facilities than men) if alcohol will be available and
- the duration of the event.
- adequate toilet facilities should also be provided for people with disabilities.

The following table is provided as a guide only and your local government authority should be consulted during planning.

For events with a gate opening time of six hours or more		For events with a gate opening time of less than six hours duration	
Female	Male	Female	Male
1 toilet per 100 females	1 toilet per 500 males, plus 1 urinal per 150 males	1 toilet per 120 females	1 toilet per 600 males, plus 1 urinal per 175 males
1 toilet plus hand wash facilities per 75 people with disabilities is suggested.			

A cleaning schedule should be established for toilets. Toilets must be cleaned, restocked with supplies regularly.

## 11. ISSUES TO CONSIDER FOR LARGER EVENTS

### Water

Events must have sufficient supply of freely available, or at a nominal charge, potable water, and clear directional signage to water. Outdoor events that expose patrons to the elements must take due care for their health and comfort. A wash basin does not constitute a drinking fountain or tap.

- How will extra water be supplied to patrons on very hot days if needed?
- What is the source of water?

### Shelter

Shelter and shaded areas should be available wherever patrons or staff and volunteers (including First Aiders) may be located for an extended period of time and where weather conditions dictate that it is required.

This may include:

- transport pick up and set down areas
- spectator and official viewing areas
- seated eating areas
- pedestrian thoroughfares
- First Aid areas and Event management centre
- competitor and officials marshalling areas
- entrances and ticketing areas
- optional area for patrons when required

### Waste Management

Waste management must be considered, following the steps below:

1. What arrangements have been made for extra bins for the event?
2. What arrangements have been made for rubbish to be appropriately removed?

### Noise

Events can create noise levels much higher than normal. Music amplifiers, refrigerators, generators, and crowds are all contributing factors. It is important to monitor the level of noise produced by the event to minimise disruption to local residents and businesses. Noise must comply with your local authority regulations.

## Security & Crowd Control

Choosing appropriate security is essential to the success of an event and the safety of the public. Different types of events require different types or combinations of security. The event organising committee needs to examine the risks involved with the event by asking for example, “What could happen?” or “What if?” The answers will determine whether police, private uniformed security or peer security is required.

## Place of Public Assembly

For outdoor events held in fenced or enclosed areas, adequate entry and exit points must be provided. Exits and paths of travel to exits are to be kept clear of obstructions. Specific requirements may vary according to the nature of the event. Entry, exit and assembly points should be clearly marked on your site plan.

## Lighting and Power

Even in venues darkened for the performance, lighting should always be adequate to identify exits as well as corridors and aisles leading to them. Auxiliary battery power or generators should be installed to provide light in a power outage and to power the public address system. The latter may permit directions to be given to spectators in a power failure, thereby alleviating panic.

As many concerts are performed with only stage lighting, access to the main lighting or house lights is essential in case of an emergency. The location of the controls for these lights, and the operation of the controls, must be known to those on-site responsible for emergencies.

For outdoor events, any electrical installation needs to be certified by an electrical contractor as complying with the provisions of your local authority.

Do you have emergency power & lighting?

---

Describe the emergency power and lighting systems:

---

It is recommended that an electrician be available for the event.

---

### Temporary Structures

Temporary Structures include:

- a stage or platform
- a tent, marquee or booth a seating stand
- a prefabricated building

A Structural Engineer's Certificate of Compliance for any temporary structures may be required. Before erecting a temporary structure for events, for example, a marquee, staging, a stand for seating or scaffolding for lighting rigs, do consult your local planning authority in good time - Historic England recommends 12-16 weeks prior to the event. The local planning authority will be able to advise on whether the structure will require planning permission or consent. Typically, structures that will be on site for less than 28 days will not require planning consent, but it is necessary to confirm this with your local planning authority, as planning law is subject to change.

Historic England has provided specific and detailed advice online:

<https://content.historicengland.org.uk/images-books/publications/guidance-on-temporary-structures-for-events/temporary-structures-historic-places.pdf>

### Fireworks and Pyrotechnics

The use of pyrotechnics and fireworks must have the approval of your local government authority and the Police.

Scheduled pyrotechnic displays will only be permitted to proceed where conditions regarding parameters such as wind strength, wind direction, fire warnings and exclusion zones can be met.