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| IALA Guideline |

G1075

A BUSINESS PLAN FOR THE COMPLEMENTARY USE OF A Heritage LIGHTHOUSE

Edition x.x

Date (of approval by Council)

urn:mrn:iala:pub:gnnnn

Revisions to this document are to be noted in the table prior to the issue of a revised document.

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|  |  |  |
|  |  |  |
|  |  |  |

1. Introduction 6

2. PROJECT MANAGEMENT PROCEDURE/STRATEGY 6

2.1. PROJECT MANAGEMENT 6

2.2. PROJECT BOARD MAKEUP 6

2.3. EXAMPLE OF REPORTING PROCEDURE DOCUMENT 7

2.4. PROJECT STRATEGY AND COMPONENTS 8

3. THE BUSINESS PLAN 9

3.1. PROJECT DESCRIPTION 9

3.1.1. INTRODUCTION (EXECUTIVE SUMMARY)  9

3.1.2. DESCRIPTION OF PROJECT 9

3.1.3. PUBLIC BENEFITS 9

3.1.4. FINANCIAL FUTURE 9

3.1.5. FINANCIAL PROJECTIONS AND PROJECTED INCOME 9

3.1.6. RISK ASSESSMENT/MANAGEMENT 9

3.1.7. BUSINESS PLAN SIGN‐OFF (INITIAL MANDATE)  9

3.2. THE organisation  10

3.2.1. HISTORY OF THE organisation 10

3.2.2. FUNCTION OF THE organisation 10

3.2.3. LEGAL STATUS AND FUNDING 10

3.2.4. ANNUAL ACCOUNTS 10

3.2.5. organisationAL STRUCTURE & STAFF 10

3.2.6. EXAMPLES OF SIMILAR BUSINESSES (VISITOR CENTRES ETC. IF ANY)  10

3.2.7. STUDIES UNDERTAKEN 10

3.2.8. RESTRICTIONS 10

3.3. DEVELOPMENT OF THE PROJECT  10

3.3.1. HISTORY OF PROJECT 10

3.3.2. PROJECT REVISION 10

3.3.3. PROJECT DEVELOPMENT WORK (PROJECT PLANNING FOR GRANT AID, PROJECT PLANNING WORK)  10

3.3.4. SUNK COSTS 10

3.3.5. OTHER SOURCES OF FUNDING (IF ANY)  10

3.3.6. STUDIES AND VISIBILITY RESEARCH 11

3.4. STRATEGIC BACKGROUND  11

3.4.1. MANAGEMENT OF NON‐OPERATIONAL LIGHTHOUSE PROPERTY 11

3.4.2. PROJECT AIM 11

3.5. PROJECT DETAILS  11

3.5.1. PROPOSAL 11

3.5.2. PROJECT OUTLINE 11

3.5.3. TIMESCALE 11

3.5.4. INVOLVEMENT OF OTHER GROUPS 11

3.5.5. PROJECT BUDGET 11

3.5.6. CAPITAL FUNDING 11

3.5.7. REVENUE FUNDING 11

3.5.8. PERMISSIONS 11

3.5.9. STAFFING 11

3.5.10. COMMUNITY INVOLVEMENT – OPERATIONAL STRATEGY 12

3.5.11. RECRUITMENT 12

3.5.12. TRAINING 12

3.5.13. MARKETING 12

3.5.14. VISITORS (EXISTING AND PROJECTED NUMBERS)  12

3.5.15. CONSTRAINTS 12

3.5.16. TARGET MARKET 12

3.5.17. OVERSEAS MARKET 12

3.5.18. CUSTOMER DEMANDS 12

3.5.19. EDUCATION 12

3.5.20. MERCHANDISING 12

3.5.21. ADVERTISING 12

3.5.22. Application of VR/AR Technology 13

3.5.23. MARKET TRENDS 13

3.5.24. Sustainable Development and Environmental Protection 13

3.5.25. COMPETITION 13

3.6. FINANCIAL APPRAISAL  13

3.6.1. ACCOUNTING REQUIREMENTS 13

3.6.2. CATEGORIES OF POTENTIAL REVENUE 13

3.6.3. PROPERTY VALUATION 13

3.6.4. HOLIDAY COTTAGES 14

3.6.5. VISITORS CENTRES 14

3.6.6. CASH FLOW 14

Flexible Financial Models 14

3.6.7. TAXATION 14

3.6.8. RATE RELIEF 14

3.6.9. FUNDING CONSIDERATIONS 14

Data Analysis and Decision Making 14

3.6.10. FINANCIAL REVIEW 14

Cybersecurity and Data Protection 15

3.7. MANAGEMENT AND STAFF  15

3.7.1. PROJECT DEVELOPMENT AND CAPITAL WORKS PLAN 15

3.7.2. organisation MANAGEMENT STRUCTURE 15

Integration of Digital Project Management Tools 15

3.7.3. STRATEGIC GUIDANCE 15

3.7.4. OPERATOR’S organisationAL STRUCTURE 15

3.8. ASSESSING RISK  15

3.8.1. ELIMINATION OF RISK 15

3.8.2. RISK ANALYSIS 16

3.8.3. PEST ANALYSIS (POLITICAL, ECONOMICAL, SOCIAL, TECHNOLOGICAL)  16

3.8.4. OPERATIONS RISK ASSESSMENT 16

3.9. MONITORING AND EVALUATION OF THE PROJECT  16

3.9.1. MONITORING 16

3.9.2. EVALUATION 16

4. PROJECT DOCUMENTS  17

4.1. LIST OF DOCUMENTS  17

4.2. OTHER DOCUMENTS 17

5. ACRONYMS 18

6. FURTHER INFORMATION  19

# Introduction

This guideline is to inform the reader of the process of developing a business plan for an individual lighthouse estate or as part of the development of an organisational estate management plan when contemplating the development for complementary uses. The scope of this document could also be known as a project plan.

Prior to a full business plan being developed a project management procedure/strategy is needed; this could be for example for the development of the business plan alone for initial appraisal or the full development of the project.

The business plan would then follow so as to provide the information required to gain approval from within the

working/financial/legal constraints of the organisation or for providing detailed information required to gain grant aid for individual/collective projects by the organisation and/or contracted out consultant, for example, a working lighthouse with public access, holiday lets, visitor’s centre and/or museum.

# PROJECT MANAGEMENT PROCEDURE/STRATEGY

## PROJECT MANAGEMENT

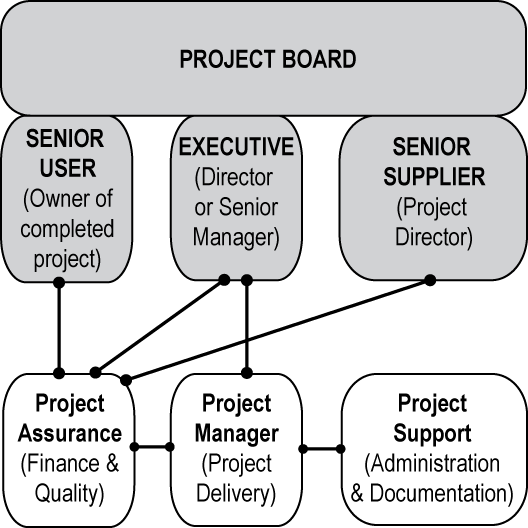
Prior to developing a business plan, a project management procedure/strategy needs to be in place, which focuses throughout on the business case with a structure that gives a specific start and finish to the project as set out in the ‘Mandate’, ‘Project Brief’, and ‘Project Initiation Document’, e.g. PRINCE2™ – see section 5 further information.

The procedure advocates the following:

* Mandate – the outline description of the project including the need, time frame and estimated budget cost – signed off at the Director or senior manager level or by the committee in the case of smaller organisations (for progression to brief).
* Brief – more detailed description of the project including the need, time frame and budget costs (basic business plan based on estimates) – signed off at a Project Initiation Group Meeting (including all interested parties (for progression to Project Initiation Document)).
* Project Initiation Document ‐ includes the business plan which is developed by the Project Manager which includes all within the ‘Brief’ with costs based on a fully worked‐up specification, signed off at the next Project Initiation Group Meeting (which includes all interested parties). Note: The Project Initiation Group could be a group of interested parties or stakeholders.
* Project Board ‐ the project then proceeds under the management of the Project Board which receives regular reports, say on a monthly basis.

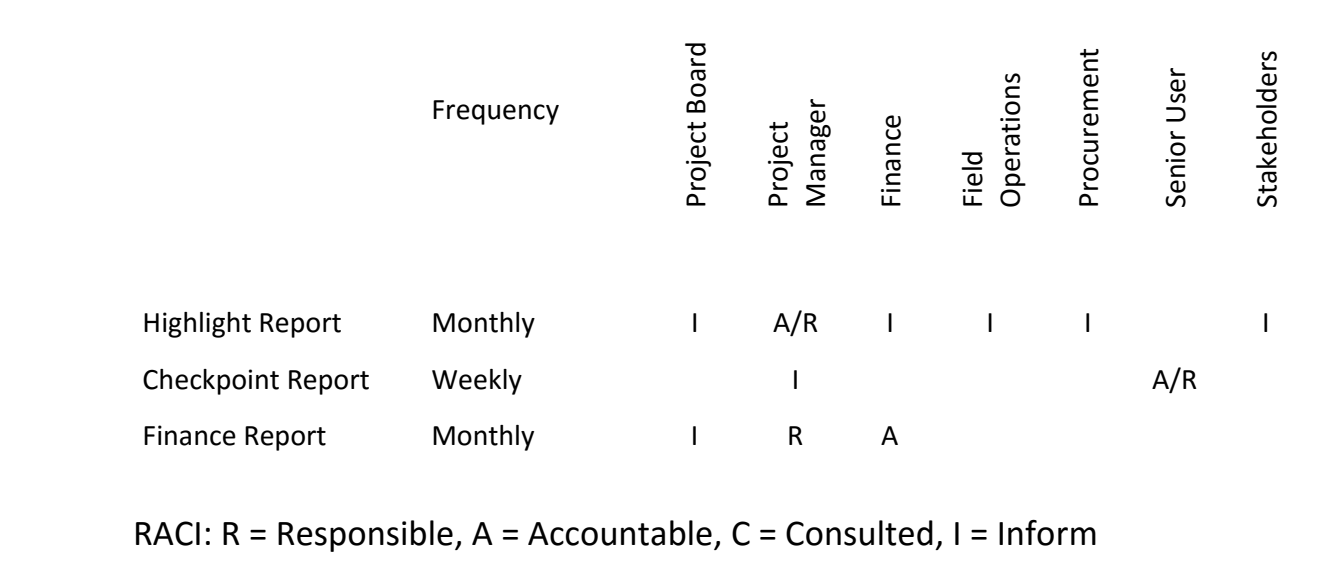
Note: that at each Project Board stage meeting the project can be paused, sent for revision or stopped by the project board either because of project issues or organisational needs.

## PROJECT BOARD MAKEUP



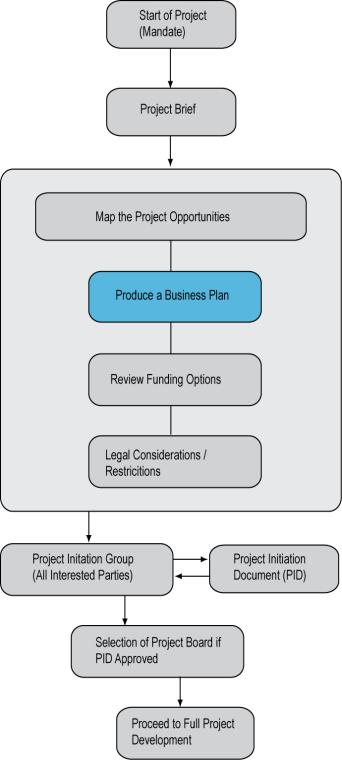
1. Project Board Makeup

## EXAMPLE OF REPORTING PROCEDURE DOCUMENT



1. Project Board – Example of reporting procedure document

## PROJECT STRATEGY AND COMPONENTS



**Components of the outline mandate for the project**

**process would include the following:**

* Brief description, time frame;
* Mapping opportunities for the project;
* Business Plan (outline);
* Review of funding options;
* Legal considerations;
* Mandate sign‐off for proceeding, further review

or cancellation.

**The business plan component of the outline project**

**process would contain the following:**

* Expected life of the project;
* The effects of what national legislation may have

on the project;

* Broad view of what the plan has to offer to the

organisation;

* Market analysis of the potential income

might be to the organisation (if any);

* Initial grant aid / governmental funding that

might be available;

* Estimate of initial costs such as consultancy,

grant aid application;

* Estimate of the capital costs to undertake the

project;

* Estimate of running costs after completion of the

project (operational & maintenance);

* Project justification;
* Business plan sign‐off for proceeding, further

*Figure 3 Business Plan Process Flow Chart* review or cancellation.

# THE BUSINESS PLAN

The following guidance is based on a list of headings the inclusion of which will depend upon the audience and the level of detail required. For example, the internal board (directors) may just require a Mandate, Brief and Project Initiation Document including the business plan to progress a project with less detail than outside bodies such as grant aid or project partnerships which would require a far greater level of detail including for instance organisation information for example (see section 3.2) to justify an organisation’s validity and qualification for grant aid.

## PROJECT DESCRIPTION

### INTRODUCTION (EXECUTIVE SUMMARY)

Some of the information that could be included within the introduction summary:

* Brief project description;
* Expected life of the project;
* The effects of what national legislation may have on the project;
* Broad view of what the plan has to offer to the organisation;
* Market analysis of what the potential income might be to the organisation (if any);
* Initial grant aid and/or governmental funding that might be available;
* Estimate of initial costs such as consultancy and grant aid application;
* Estimate of the capital costs to undertake the project;
* Estimate of running costs after completion of the project (operational & maintenance);
* Project justification.

### DESCRIPTION OF PROJECT

A brief description of what the project is about and what is involved, including a summary of strategy for assuring long‐term financial future.

### PUBLIC BENEFITS

Provide a summary of public benefits say, employment, tourism, education etc.

### FINANCIAL FUTURE

Provide a Summary of the project strategy for assuring the long‐term financial future of the project.

### FINANCIAL PROJECTIONS AND PROJECTED INCOME

Provide projections based on locality predictions of visitor numbers and fees.

### RISK ASSESSMENT/MANAGEMENT

Provide a summary of the main risks facing the project while in progress and at its completion.

### BUSINESS PLAN SIGN‐OFF (INITIAL MANDATE)

Sign off Mandate including the initial business plan providing progression to the brief and then the project initiation document.

## THE organisation

### HISTORY OF THE organisation

Provide a history of the organisation for example Corporation, Local authority, Government body, or Limited Company.

### FUNCTION OF THE organisation

Provide documentary evidence of the organisation’s purpose and aims, its structure, its mission statement etc.

### LEGAL STATUS AND FUNDING

Provide documentary evidence of the legal/charitable status of the organisation with names/details of any other groups involved.

Funding disclosure would include all means of funding from core funding, profit or non‐profit making to outside grant aid bodies, etc.

### ANNUAL ACCOUNTS

Provide summary details of accounts and the status of their availability if seeking grant aid.

### organisationAL STRUCTURE & STAFF

Provide diagrammatic organisation/staff structure with reference to the number of full‐time and part-time staff.

### EXAMPLES OF SIMILAR BUSINESSES (VISITOR CENTRES ETC. IF ANY)

Provide examples of similar projects undertaken in the past including their successes and failures.

### STUDIES UNDERTAKEN

Provide any preliminary studies that have been undertaken to bring the project to this stage, such as projected visitor numbers etc.

### RESTRICTIONS

Provide any physical, operational, designation, or financial restrictions which may impact  the project such as environmental issues, access issues etc.

## DEVELOPMENT OF THE PROJECT

### HISTORY OF PROJECT

Provide information on the concept of the project including a detailed summary of the initial documents.

### PROJECT REVISION

Provide a summary of project revisions prior to arriving at this stage.

### PROJECT DEVELOPMENT WORK (PROJECT PLANNING FOR GRANT AID, PROJECT PLANNING WORK)

Provide a development plan with regard to the physical and financial requirements of the project.

### SUNK COSTS

Provide any costs leading up to this stage of the project i.e. preliminary planning, consultations etc.

### OTHER SOURCES OF FUNDING (IF ANY)

Provide evidence of secondary funding in place or predicted to be available from outside sources.

### STUDIES AND VISIBILITY RESEARCH

Provide any studies/research available within the organisation or available from outside sources that will support the project.

## STRATEGIC BACKGROUND

### MANAGEMENT OF NON‐OPERATIONAL LIGHTHOUSE PROPERTY

Provide organisational aims/policy prior to the project and provide evidence on how this project will benefit the aims in regard to future development/policy.

### PROJECT AIM

Provide the benefits and possible restrictions on the estate by undertaking this project.

## PROJECT DETAILS

### PROPOSAL

Provide a full proposal of the project highlighting the benefits to the organisation by undertaking the project.

### PROJECT OUTLINE

Provide a diagrammatic/prescriptive outline.

### TIMESCALE

Provide practical timescales for setting up the project, undertaking the project, closing out the project and financial spending.

### INVOLVEMENT OF OTHER GROUPS

Provide information on all third parties with interests in the project (such as local government, cultural heritage protection organisations, the tourism bureau, and the local community), maintain cooperation and communication, and regularly report on project progress to facilitate its smooth implementation.

### PROJECT BUDGET

Provide spreadsheets outlining the budget breakdown and predicted spend.

### CAPITAL FUNDING

Provide details of capital costs i.e. estate improvement/infrastructure etc.

### REVENUE FUNDING

Provide details of revenue costs i.e. predicted running costs, maintenance etc.

### PERMISSIONS

For example, provide details of planning and environmental permissions required i.e. Listed Building, Change of use, Building regulations, Environmental impact assessments etc.

### STAFFING

Provide expected staffing levels to operate the completed project on an overall basis highlighting seasonal variances and including human resource issues and expected salaries.

### COMMUNITY INVOLVEMENT – OPERATIONAL STRATEGY

The completed project may allow assistance from the community for instance voluntary staffing and/or use of thefacilities by the community for meetings and events.  Provide a strategy with regard to operational and legal issues.

### RECRUITMENT

Provide details of the availability of the local labour force to cover seasonal variances.

### TRAINING

Provide details of initial and future training requirements for permanent and/or seasonal staff/volunteers.

### MARKETING

Marketing consultants could be engaged to ascertain the project's potential with regard to its overall strength of attraction and commerciality.

### VISITORS (EXISTING AND PROJECTED NUMBERS)

Marketing consultants and the local tourist board could be engaged to provide detailed year-on-year figures for similar types of attractions within the geographical area.

### CONSTRAINTS

The constraints in a lighthouse location can be vast and varied. Part of the initial project assessment should be a risk assessment within the curtilage of the estate and an evaluation of any access restrictions to the site.

### TARGET MARKET

Marketing consultants and the local tourist board could be engaged to provide details of the target market so as to provide guidance for the project development in relation to project spending/quality against projected income.

### OVERSEAS MARKET

Marketing consultants could be engaged to ascertain the project potential with regard to overseas interest by providing details of geographical interest from internet access and overseas visitor numbers.

### CUSTOMER DEMANDS

Marketing consultants could be engaged to ascertain the demands of the target market and to ascertain the uniqueness of the project to meet the demand.

### EDUCATION

Engagement with the educational departments to consider educational experiences for schools based on the National Curriculum taking into account existing and future technology, history and the environment.

### MERCHANDISING

Provide market research on the prospective market expectations emphasising, for example, the lighthouse brand and/or the educational aspects of the lighthouse/aid to navigation.  Marketing consultants could be engaged to assist or ascertain the market demand so as to provide quality merchandise for the top end of the market and merchandise which would return a profit against the main customer demand.

### ADVERTISING

Marketing consultants could be engaged to provide the strategy for project advertising both locally, nationally and worldwide.  This could be in conjunction with other projects in the locality or nationally both external to the organisation and within it. The project's uniqueness should be promoted in relation to other industrial, navigational or maritime attractions. Additionally, new marketing strategies such as content marketing, influencer marketing, and digital advertising should be appropriately introduced. Utilizing artificial intelligence (AI) for precision marketing can enhance the effectiveness of market promotion.

### Application of VR/AR Technology

During the project presentation and planning phases, utilize Virtual Reality (VR) and Augmented Reality (AR) technologies to offer stakeholders and potential clients immersive experiences, helping them to better understand the scale and potential of the project.

### MARKET TRENDS

Marketing consultants could be engaged to provide information on market trends (historical and future) so as to inform the project team how to best promote the project in a flexible manner in order to meet customer demands.

### Sustainable Development and Environmental Protection

The project should consider Sustainable Development Goals (SDGs), including carbon emission calculations, the use of renewable energy, and the selection of environmentally friendly materials, to ensure that the project's environmental impact is minimized.

### COMPETITION

Marketing consultants could be engaged to provide information on similar projects within the locality.  Competition can be either negative as in taking a greater market share or positive as one project can complement another and assist with marketing etc.

## FINANCIAL APPRAISAL

### ACCOUNTING REQUIREMENTS

*  Define categories of potential revenue;
*  Analyse income and costs for each category within the project;
*  Prepare cash flows over say a 15-year spread;
*  Cost-benefit analyses of outright sale/leasing/exploitation;
*  Amalgamate analyses into total cash flow summary;
*  Consider taxation implications;
*  Consider possible loss of general rate relief;
*  Funding considerations.

### CATEGORIES OF POTENTIAL REVENUE

 Holiday (lets/destination);

 Long‐term property/accommodation let;

 Visitor centres at lighthouse sites;

 Merchandising units.

### PROPERTY VALUATION

*  Current market value;
*  Analyses of projected enhancement value against investment;
*  Projected property value analyses;
*  Lessor’s position (if part or all the property is leased);
*  Asset Register implications.

### HOLIDAY COTTAGES

*  Rental income;
*  Leasehold sale / Short Term Leasing;
*  Refurbishment costs;
*  Maintenance costs;
*  Running costs;
*  Overhead costs;
*  Cost-benefit analyses of the above.

### VISITORS CENTRES

*  Licensing arrangements and potential percentage income;
*  Marketing and potential percentage income;
*  Refurbishment costs;
*  Maintenance costs;
*  Running costs;
*  Overhead costs;
*  Cost-benefit analyses of the above.

### CASH FLOW

Provide projected cash flows over a given period for the given project.

### Flexible Financial Models

Use flexible financial models such as sensitivity analysis and scenario planning to respond to market changes and uncertainties, enhancing the financial robustness of the project.

### TAXATION

Analyses of potential taxation on all aspects of the project, for example, refurbishment works and completed project profits.

### RATE RELIEF

Effect of the project on the business rates pertaining to the property/ies.

### FUNDING CONSIDERATIONS

Provide analyses of the availability of internal and viable external funding and their implications with regard to organisational operational restrictions (if any).

### Data Analysis and Decision Making

The project team should utilize big data analysis and machine learning models to forecast visitor numbers, financial performance, and market demand. Data-driven decision-making methods will enhance the reliability and accuracy of the project.

### FINANCIAL REVIEW

Provide overall financial review taking into account contingency, inflation and risk.

Note: ‘IALA‐AISM Lighthouse Conservation Manual – Edition 1 Sec 6 p70‐72’

Note: for a guideline on how to provide a **financial appraisal for heritage projects** ‐ Heritage Lottery Fund (UK) www.hlf.org.uk.

### Cybersecurity and Data Protection

During the project's digital transformation process, strengthen cybersecurity and data protection measures to ensure the security and integrity of project data.

## MANAGEMENT AND STAFF

### PROJECT DEVELOPMENT AND CAPITAL WORKS PLAN

Select project operators to be assigned to the project for example, holiday lets or visitors centre as part of the project development so that they can provide a proposed programme to assist with overall design, staffing levels, financial forecasts and overhead costs.  This will allow a more accurate projection of capital works costs and potential running costs.

### organisation MANAGEMENT STRUCTURE

Provide provision of the organisational management structure, project team structure, operator team structure and organisation maintenance structure.

### Integration of Digital Project Management Tools

Integrate modern project management software (such as JIRA, Trello, Asana) and collaboration platforms (such as Slack and Microsoft Teams) to optimize project management processes and enhance team collaboration efficiency.

### STRATEGIC GUIDANCE

This could be the provision of a steering group to advise internal and external stakeholders of the project objectives and to provide guidance on the administration of the completed project within the organisation and the management of the operator.

### OPERATOR’S organisationAL STRUCTURE

This would include anticipated management and staffing levels.

## ASSESSING RISK

### ELIMINATION OF RISK

Provide a comprehensive list of items which would eliminate or reduce the risk to the project and its ongoing development:

*  Provide a sound business plan;
*  Prevent interference with the organisation’s duties;
*  Protect Aids to Navigation (if still operational);
*  Provide for future Aids to Navigation;
*  Consider building conservation and the environment;
*  Consider the historical significance of the lighthouse/property;
*  Protect the corporate brand;
*  Engender economic growth and sustainability;
*  Consider public access;
*  Consider disabled access;
*  Consider environmental impact;
*  Consider meteorological impact;
*  Consider security/fire prevention.

### RISK ANALYSIS

Provide risk analysis which would cover the risk to the organisation in implementing and managing the completedproject for example, planning (listed building consent), financial, environmental, legal, delays etc. It is advisable to consider adopting real-time risk management by utilizing real-time risk assessment software and dynamically adjusting risk management strategies to ensure timely identification and response to risks throughout the project process.

### PEST ANALYSIS (POLITICAL, ECONOMICAL, SOCIAL, TECHNOLOGICAL)

Conduct a PEST analysis which examines the political, economic, social and technological influences surrounding the project and whether their impact is negative (a threat) or positive (an opportunity).

### OPERATIONS RISK ASSESSMENT

The proposed operators (third party) would provide a risk assessment to cover their own business planning process.

The risk to their own business would be reduced by:

*  Preparing a legal document for a partnership or Limited Company;
*  Providing insurance cover for sickness/death of operators;
*  Providing insurance cover for financial risks to the owner;
*  Appointing other managers and developing them to be able to care for the site;
*  Full standard operating procedures are clearly written out for all aspects of the organisation.
* Incorporate an Integrated Health, Safety, and Environment (HSE) management system, combining IoT devices for real-time monitoring of the working environment to ensure safety during project construction and operation phases, reducing the occurrence of accidents.

## MONITORING AND EVALUATION OF THE PROJECT

### MONITORING

The Project Manager appointed would develop and implement the phases of the project work, and undertake full

monitoring of the project to completion, including supplier assessment, quality supervision; progress and financialtracking (see Project Management Procedure/ Strategy ‐ Section 2).

### EVALUATION

The Project Board will undertake an ongoing evaluation of the progress of the project, based on monthly progress reports and site visits when considered appropriate.

The main contractor responsible for the site works will be subject to a defects liability period from practical completion.  All installed purchased equipment will be subject to normal manufacturers' or suppliers' warranties.

The Project Board and the Project Manager will undertake a snagging examination of the project on practical completion, and a further evaluation on final completion to ensure that it meets the high standards set by the project specification.

The appointed Operator will be kept informed of progress during the construction programme, will be involved in the assessment of the works during the equipment installation phase, and will be consulted during the snagging and final evaluation.

Appropriate feedback will be provided to the organisation’s Finance Department so as to provide sufficient information as required by the organisation/ project board and or external funding process.

The external grant aid provider (if applicable) will be kept informed of the progress of the project following implementation of the plan on handover to the selected Operator.

# PROJECT DOCUMENTS

## LIST OF DOCUMENTS

A selection of documents required for internal and/or external grant aid provider management and assessment includes:

1. Mandate.
2. Brief.
3. Project Initiation Document.
4. Project Board Reports.
5. Location Plan.
6. Proposed Plan (for example Conservation and/or Conversion Work).
7. Programme for the Works.
8. Project – Summary of Cost.
9. Summary of Building Work Costs.
10. Management organisation (the project).
11. Operator’s Proposed organisational Program.
12. Operator’s Information – (spreadsheet, Programme, Staffing, Cash Flow).
13. Educational Plan (including National Curriculum).
14. Forecasts and Profit & Loss Account.
15. Audience Development Plan.
16. Access Plan.
17. Conservation Management Plan.
18. Interpretation Plan.
19. Heritage Impact Assessment.

## OTHER DOCUMENTS

1. Report and Accounts.
2. Constitution, Powers and Functions (as required).

# ACRONYMS

AV  Audio / Visual

CATA  Cornwall Association of Tourist Attractions

CCTV  Close circuit television

CD‐rom  Compact Disc Read‐Only Memory

DC  District Council

DoT  Department of Transport

DVD  Digital Versatile Disc

EU  European Union

GLA  General Lighthouse Authority

GLO  Generic Learning Outcomes

GPS  Global Positioning System

ha  hectare

HLF  Heritage Lottery Fund

H&S  Health & Safety

IALA  International Association of Marine Aids to Navigation and Lighthouse Authorities

ICT  Information and Communications Technology

km  kilometre

KS 1/2/3/4  Key Stage 1/2/3/4 (education)

m2 square metre

NT  National Trust

OAP  Old Age Pensioner

pa  per annum

PDD  Project Delivery Department

PEST  Political, Economical, Social, Technological (analysis)

PLB  a consulting company

PR  Public Relations

RNLI  Royal National Lifeboat Institution

RSPB  Royal Society for the Protection of Birds

SSSI  Site(s) of Special Scientific Interest

TH  Trinity House

UK  United Kingdom

UNESCO  United Nations Educational, Scientific and Cultural Organisation

VAT  Value Added Tax

VFR  Visiting Friends and Relatives (Family)

VIP  Very Important Person

YHA  Youth Hostel Association (UK)

# FURTHER INFORMATION

www.hlf.org.uk   Heritage Lottery Fund (UK)

www.prince2.org.uk   (Project Management procedures/strategy)

IALA‐AISM Lighthouse Conservation Manual – Edition 1

1. EXAMPLE OF BUSINESS PLAN ‐ LIZARD LIGHTHOUSE (UK)

Appendices should be started on a separate page and contain information that is directly relevant to the main body of the text at a certain point, but that would be too large or distracting to include at that particular point. There are four levels of appendix heading styles available in the **Style Gallery.**

* 1. Example of Appendix Head 1 style
     1. Example of Appendix Head 2 Style

At the end of the **Appendix head 2** style text press carriage return, the following paragraph is **the Heading 1 separation line** style, press carriage return again, and the following line will be in **Body text** style.

* + - 1. Example of Appendix head 3 style

The same following formatting applies to the **Appendix Head 3** style i.e., press carriage return, the following paragraph is the **Heading 2 separation line** style, press carriage return again, and you will be back to body text.

* + - * 1. Example of Appendix Head 4 style

The Appendix Head 4 style is followed by body text and does not have a separation line. Only the level 1 **Appendix Title** will appear in the TOC.

* + - * 1. Example of Appendix Head 5 style

The **Appendix Head 5 style** is followed by body text and does not have a separation line. Figure and tables should be labelled as a continuation from the main Guideline content.

1. Example of Annex title (Head 1) style

Annexes should include information that can exist in isolation e.g.

* a technical specification for a new piece of equipment;
* the content and structure of a new training module; or
* the detail associated with a new recommendation for an AIS.

Annexes can include appendices if required. There are also four levels of annex heading styles available in the **Style Gallery.** In addition to the **Annex title** (**Head 1)** style there is **Annexe Head 2**, **Annexe Head 3** and **Annexe Head 4**. These follow a similar format to the appendix heading styles. As many annexes can be included as needed and it is advisable to separate them with a page break. Only the level 1 **Annex title** style text will appear in the TOC.

* 1. Example of Annex Head 2 style
     1. Example of Annex Head 3 style
        1. Example of Annex Head 4 style

Annex figures and tables should be labelled with the **Annex Figure Caption** and **Annex Table Caption** styles respectively, rather than the main figure and table caption styles. This ensures the annex can be read logically in isolation and that annex figures and tables are not included in the List of Figures and Tables respectively on the main Guideline contents page.

1. Example of annex figure caption
   * + - 1. Example of Annex Head 5 style