

Form 2 - Foreign travel and associated expenditure approval (occasional travel)

For use by teams not listed in Guide 1 – and therefore without prior agreement of the need for overseas travel. For more guidance, see the Foreign travel, gifts and hospitality policy.

Employees planning to travel:

Employee name(s):	Job title(s):
Allyson Lewis	Archivist, Essex Record Office
Neil Wiffen	Public Service Team Manager, Essex Record Office

Purpose/reason justifying the visit:

Details:

Background

- The Essex Record Office (ERO) business plan (approved in December 2014) envisages increasing ERO's income significantly over the next two years.
- This visit is part of the marketing activity linked to these income targets, for which funding is included in the ERO business plan.

Targeted marketing opportunity

- Essex Ancestors (EA), our subscription service to the on-line digital archive, is a major part of our income generation plans.
- New England is a major potential market for EA, due to early migration to America by people from Essex, which has not been targeted so far. Only 6% of our subscriptions are from North America. This offers a significant growth opportunity.
- In the Boston area there are 32 archive holding bodies and 4.59 million residents.
- The New England Historical and Genealogical Society (NEHGS) is a well-respected family history society and is said to be the largest society of its kind in the world. It is the oldest family history society in the USA and is celebrating its 170th anniversary this year. It promotes its events to 73,000 subscribers and 27,000 members.

Specific plans and objectives

- NEHGS holds an annual conference each summer (2015 is sold out) and we have been invited to provide a presentation and workshop as part of the conference.
- In addition, meetings have been arranged with 3 other archive institutions in Boston and we are negotiating with a further 7 bodies to arrange visits. This will raise awareness of ERO and EA to a new audience both online and in person.
- A piece about EA and our visit will be placed with the *Boston Globe* newspaper which has a circulation of 250,000-300,000 and an online subscription readership of 25,000.
- The major attraction of our presentation will be original documents which are older than the city of Boston itself ! For the security of the documents they must be supervised at all times. This will require two people.

- The aim is to attract new subscriptions to EA from this large potential audience. 47 annual subscriptions (£85) would cover the cost of the visit. 270 annual subscriptions would meet the EA income target for this year.

Other benefits

- Other benefits from the visit will be to promote Essex as a tourist destination to potential American visitors. The value of ancestral tourism to Essex is currently £500,000 p.a. We know that overseas visitors contribute more to the local economy than UK visitors.
- The visit will lay the foundations for contacts and connections over the next 3-5 years to prepare for events celebrating the 400th anniversary of the sailing of the Mayflower in 2020.

Anticipated value / benefit to ECC / Essex:

Details:

- Increased income to Essex Ancestors (EA) in accordance with the Business Plan.
- Marketing of EA to over 100,000 new customers.
- Contacts made with 10 other archive bodies and making EA known to their visitors and online communities reaching a further audience of over 300,000 people.
- Increase in personal visits to Essex with impact on local economy (tourist spend on accommodation, travel, food etc).
- Contacts made regarding potential future collaborations such as celebrating (in 2020) the 400th anniversary of the Mayflower expedition, with impact on tourism.

Details of visit – dates, itinerary, people/organisations to be visited:

Include also potential engagements –state not yet finalised where this is the case.

Details:

2 August Fly from London to Boston
3 August Presentation and workshop to Come Home to New England conference (NEHGS, Boston)
4 August Presentation to National Archives at Boston (in train)
5 August Presentation to University of Massachusetts Library and Special Collections (in train)
6 August Presentation to Boston City Archives
7 August Presentation to Massachusetts State Archives
7 August Fly from Boston to London
8 August Arrive London

As opportunity arises, distribution of leaflets about Essex to hotels, museums, art galleries etc

Estimated costs:

Refer to policy for key areas, eg travel, accommodation, hospitality, gifts if required, and so on. Add information needed to give a clear understanding of the visit and likely expenditure.

Item:	Notes:	Cost estimate:
Travel	2 flights to Boston depart London Heathrow 11:15 2 August arrive Boston 13:25 2 August; depart Boston 19:10 7 August arrive London Heathrow 6:30 8 August	£3, 140
Accommodation	5 nights at Hotel 140, 140 Clarendon Street, Boston (1 night accommodation to be funded by NEHGS), 1 x ESTA \$14	£ 825
Subsistence	Breakfast, Lunch and Dinner to ECC guidelines	
Local Travel	Local travel may include taxis where appropriate.	
	All covered by existing budget.	

Authorised by:**1. Executive Director:**

Name	Signature	Date
Margaret Lee	<i>Margaret Lee: by e-mail 11 June 2015</i>	11 June 2015

Comments:

Authorised - This visit is aligned to the strategy for the development of the business, and the travel conforms to approved policies

2. Chair or Member representative of Member/Officer Foreign Travel Committee:

Name	Signature	Date

Comments:

The authorising Member will return this form to the Executive Director to copy to each employee approved to travel. The Executive Director will also retain a copy and forward the original to the Executive Director for Corporate Services.