



Plan of management
Fort Scratchley
2013

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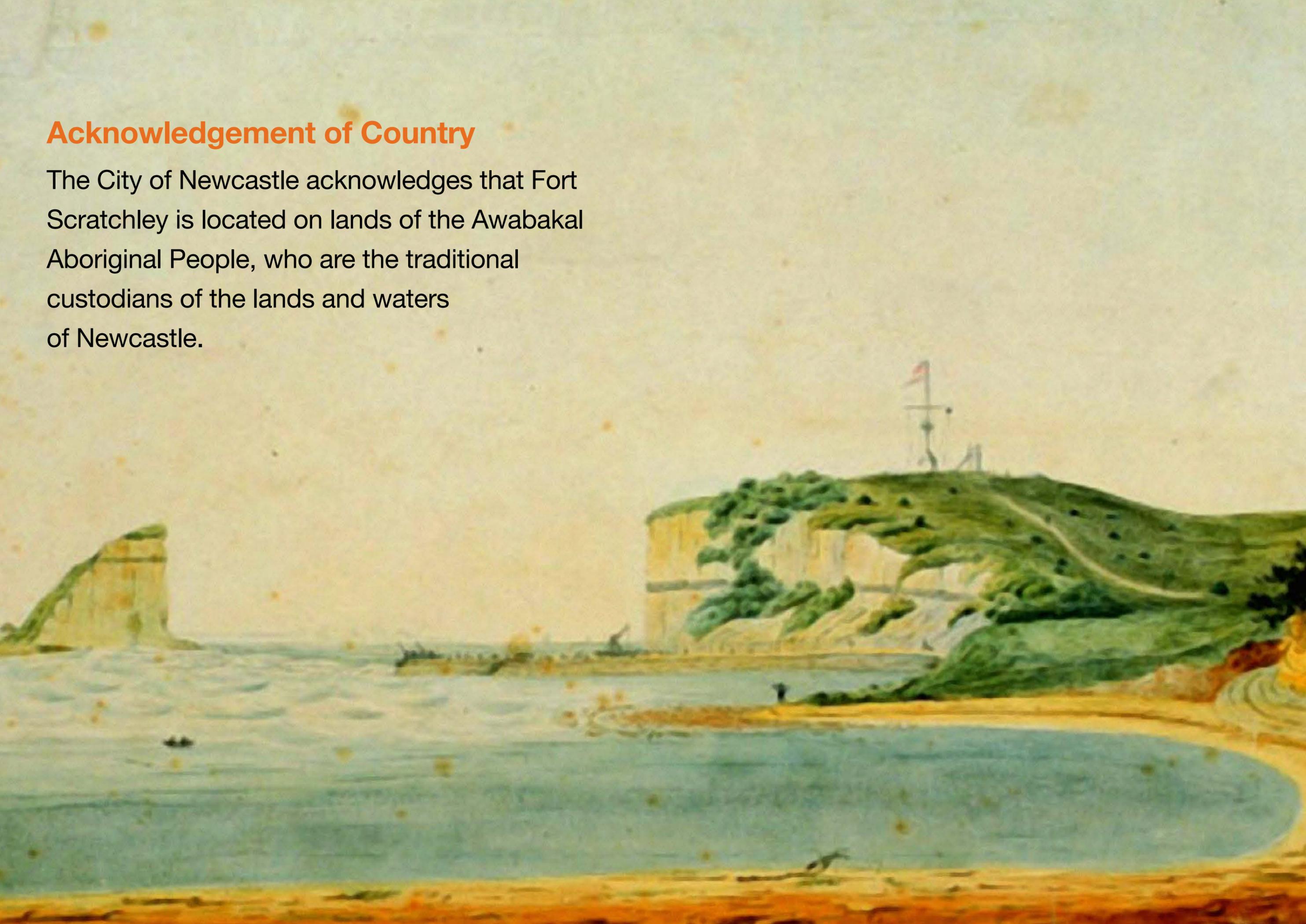
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of The City of Newcastle

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Acknowledgement of Country

The City of Newcastle acknowledges that Fort Scratchley is located on lands of the Awabakal Aboriginal People, who are the traditional custodians of the lands and waters of Newcastle.



1.0 Executive Summary

1.1 Background

Arguably Newcastle's most spectacular vantage point, Fort Scratchley Historic Site commands a significant position overlooking the Hunter River Estuary, coastline and Nobbys Headland.

Fort Scratchley is a site of outstanding heritage significance, listed as part of the Coal River Precinct on the NSW State Heritage Register and the Newcastle *Local Environmental Plan 2012*.

Signal Hill, and subsequently Fort Scratchley was the site of the first European coal mine in Australia and the site of a coal-fired navigation beacon. It was a strategic fort for over 150 years and is Australia's only coastal fortification to fire on an enemy Naval vessel firing two salvos at a Japanese submarine that bombarded Newcastle with about two dozen shells during World War II.

The ownership of Fort Scratchley Historic Site was transferred to The City of Newcastle from the Commonwealth Government in June 2008. Council is responsible for protecting the values of the site and ensuring it is utilised to its full potential.

The Fort Scratchley Historical Society, through its volunteers, has managed the day to day operations of the Fort for over 20 years. It is through the dedicated work of the volunteers of the Society, namely the interpretation of a working fort including working guns, that has made Fort Scratchley the unique site it is today, attracting visitors locally and from all over the world.

Today visitors can take guided tours, visit the Fort's museum and experience re-enactments of activities from the period when it was an operating fort. The site also offers a unique venue for events and functions and is a vantage point to enjoy the expansive views of Newcastle.

A plan of management was prepared for Fort Scratchley in 2008 to coincide with the transfer of ownership to Council. The 2008 Plan categorised the site as Cultural Significance, General Community Use and Park. This new plan of management has delineated these land categories in accordance with the requirements of the *Local Government Act 1993*.

This new plan of management sets out a clear direction for the Fort's future and how it is to be

managed and used over the next five to 10 years. It reconfirms the heritage values identified in the *Fort Scratchley Historic Site Heritage Management Plan 2008* (the Heritage Management Plan) and ensures these values are protected in future management decisions. Further, the Plan endeavours to action recommendations identified in the Heritage Management Plan and address issues that have arisen since the adoption of the 2008 Plan of Management.

1.2 Values, vision, principles for management, key objectives and strategies

1.2.1 Values

'Values' can simply be described as elements that make a place important. A plan of management is a values-based document, meaning that management actions are shaped to reflect, maintain and enhance the values of the place. The site's identified values are:

- Historic
- Rarity
- Scientific
- Representative
- Aesthetic
- Technical
- Social
- Associative

1.2.2 Vision

A vision for Fort Scratchley was developed with the community and stakeholders to provide for its overall direction.

Fort Scratchley is a nationally significant, unique cultural and community experience reflecting an operating fort.

1.2.3 Principles for management

The following management principles are taken from the 'general principles' within the Heritage Management Plan. They provide broad statements of intent and priority to guide actions and management decisions responding to unforeseen situations and challenges.

- To retain and conserve the site in accordance with the Burra Charter of Australia and its associated guidelines.
- To manage the site with the primary objective of enhancing the military heritage by explaining the history and significance of the Fort, supported by interpretive displays that demonstrate the functioning of individual components.
- To present and interpret the site's significance in Newcastle's earlier history (penal settlement, coal mining and port activities).
- To have primary regard for physical conservation and interpretation. The site should become financially self supporting, however, it should not be required to yield a return on funds invested.
- To retain and conserve all buildings, structures and landscape elements in the inner Fort precinct.
- To manage the grounds of the site as an integral part of the place. The bare open nature of the setting should be maintained although some former elements may be introduced for interpretive or operational reasons. New elements should only be introduced where essential for the site's operation.
- To maintain and where possible enhance significant views to and from the site.
- To maintain and where necessary preserve and restore the fabric of built elements.
- Sympathetic adaptation may occur to assist in interpretation of the operation of the place. Intervention in significant fabric should be minimal and reversible wherever possible.
- To curate and conserve collections of moveable artefacts in an appropriate manner.
- To interpret the site in a manner that presents its significant attributes, particularly the major phases of its history and development.
- To retain the inner Fort precinct in its present configuration. Buildings, structures and spaces of greatest significance and interest should be made available for interpretation of the significance of the place.
- To accommodate the management needs of the site within existing buildings in the inner Fort precinct and not erect new structures within this area.

1.2.4 Management Objectives

Eleven objectives underpin the strategies and future direction for Fort Scratchley. These are consistent with the core objectives for the Community Land categories identified for the site and broader objective's of Newcastle 2030 Community Strategic Plan.

1. Recognise and promote Fort Scratchley as a site of outstanding cultural significance and national importance.
2. Actively conserve and manage the Fort's heritage values through appropriate maintenance and repair.
3. Establish and maintain a governance structure appropriate to the Fort's significance and complexity.
4. Provide adequate resources to ensure the long-term sustainability of the site.
5. Retain and conserve moveable items in accordance with accepted principles and guidelines.
6. Provide a cultural tourism experience based on the Fort's unique cultural heritage values.
7. Provide ways for visitors to enjoy the experience and develop an understanding and appreciation of the Fort's heritage values and the need to conserve and manage these values.
8. Suitably manage and conserve the natural and cultural significance of the Fort's landscape and setting.
9. Provide for passive recreational activities that complement the Fort's cultural heritage and natural setting.
10. Promote the site in a manner that enhances public appreciation of the site's heritage values, while enhancing the quality of the visitor experience and maximising economic returns from visitors.
11. Provide unique experiences and opportunities to encourage broad and repeat visitation.

1.2.5 Strategies

The key strategies for Fort Scratchley are:

- Develop and maintain an Asset Management Plan for the site to meet the required level of service in the most optimal way.
- Establish a management structure for the Fort that ensures the highest standard of planning, operation and maintenance.
- Formally support and publicly acknowledge the substantial work undertaken by the Fort Scratchley Historical Society.
- Explore potential funding opportunities to achieve financial sustainability for the Fort.
- Promote Fort Scratchley as a key destination in Newcastle.

For a detailed list of actions refer to the management action tables (section 7.3).

2.0 Plan structure

This plan of management has been prepared in accordance with the *Local Government Act 1993*, other relevant legislation, and the relevant Council plans and policies. It comprises:

- **Introduction and overview** – briefly describes plans of management, the aim of this Plan and the land to which it applies.
- **Site description** – provides a brief history of Fort Scratchley and describes its heritage significance, usage and condition.
- **Planning context** – outlines the legislative requirements of a plan of management and describes other relevant legislation, policies and strategies.
- **Basis for management** – outlines the approach to determining management strategies for the site. This includes a summary of community consultation, a vision statement, management principles and values. This section also identifies the appropriate categorisation of the land, and the broad objectives and directions for the site's future management.
- **Management directions and actions** – identifies specific management strategies and outcomes for Fort Scratchley. This section outlines permitted uses and future development and authorises leases and licences in accordance with the *Local Government Act 1993*.
- **Implementation and review** – identifies an indicative program for implementation of key management actions, as well as, a review schedule for the Plan.

2.1 Study process

In preparing this plan of management, Council considered and incorporated, where appropriate:

- existing relevant policies, procedures and other Council documents;
- existing information from the Heritage Management Plan; and
- input provided by key stakeholders and the broader community at a number of workshops.

Stakeholder and community consultation including:

- workshops with key stakeholders in 2012 as part of a strategic planning exercise;
- a workshop with a project control group in June 2013 as the initial step in developing this plan of management; and
- community and industry workshops in July 2013.

The Draft Fort Scratchley Plan of Management was exhibited for public comment from XXXXXX to XXXXXXXX. One submission was received and considered in the final document.



3.0 Introduction and overview

3.1 What is a plan of management

A plan of management provides the framework for managing community land. The plan identifies current use and activities and approves future use, activities and developments.

Fort Scratchley is located on community land. This classification means that the land is owned by Council and is managed for use by the community. The *Local Government Act 1993* (the Act) governs the preparation of plans of management for land classified as community land and prescribes what must be included in a plan of management. This includes the “categorisation” of the Community Land under the terms of the Act, which in turn provides the core objectives to guide management of an area.

This Plan meets the requirements of the *Local Government Act 1993*.

3.2 Aims of the Plan

The principal aim of the plan of management is to provide a clear and long-term direction for the future conservation, management, use and development of Fort Scratchley.

It is a key document in advocating outcomes that support the Fort’s long-term conservation, recreational use and financial security.

Specifically the Plan aims to:

- identify and conserve Fort Scratchley’s intrinsic historic, aesthetic and social values
- determine the appropriate use and development of the Fort, ensuring these are compatible with the inherent values of the site, especially the heritage values
- develop appropriate management responses to the issues affecting the Fort and actions that reflect Council and community expectations within reasonable resource constraints
- meet legislative requirements for the *Local Government Act 1993* and the *Heritage Act 1977*

This plan of management should be read in conjunction with the Heritage Management Plan, which provides the context and policy direction to appropriately conserve

and manage the Fort’s heritage values. This plan of management provides for effective implementation of the policies from the Heritage Management Plan through a range of suitable strategies.

A significant level of research, physical analysis and historical information is contained within the Heritage Management Plan, which is not replicated in this Plan.

3.3 Land to which this Plan applies

This plan of management applies to the area described as Fort Scratchley (Council land register number C 373), comprising Lot 1, 2 and 5 DP 407886. The site is approximately 3.63 hectares in area. The site is zoned RE1 Public Recreation in the Newcastle Local Environmental Plan 2012. It is classified as Community Land.

The Fort Scratchley Site is located within the Newcastle East Conservation Area and is a key feature of the State Heritage Listed Coal River Precinct, which includes landmarks such as Nobbys Headland, Macquarie Pier, and adjoining foreshore.

Figure 1 shows the site’s location and surrounds

3.4 Heritage listings

The heritage significance of Fort Scratchley is recognised in the following statutory and community heritage lists or registers:

Table 1: Heritage listing of the site

Register	Item name	Year inscribed
NSW Heritage Register #01674	The Coal River Precinct (including Fort Scratchley Site)	2003
City of Newcastle Local Environmental Plan 2012 #1480	The Fort Scratchley Group (buildings and underground forts – Coal River Precinct)	2012
National Trust Register #4355	Fort Scratchley Site	1998

While this Plan was being prepared, there was a national nomination for Coal River (Mulubinba) and Government Domain being considered by the Commonwealth Government. This nomination was submitted by the Coal River Working Party in February 2013 and includes Fort Scratchley.

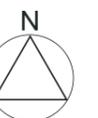


Figure 1 - Context Map
FORT SCRATCHLEY

0m 100 250 500m

LEGEND

- - - - Coal River Precinct - NSW Heritage Register
- Fort Scratchley boundary



Maps prepared by The City of Newcastle Landscape Architectural Services for the Fort Scratchley Plan of Management - July 2012

4.0 Site description

4.1 Brief history of Fort Scratchley

This history is an abbreviated version of the more detailed histories and chronologies of the place contained within the Heritage Management Plan.

- The Aboriginal presence in and around Signal Hill predates European contact.
- 1797 Lieutenant Shortland camped at the base of Signal Hill when he entered and surveyed the river and noted the coal seams on the cliff face.
- Colliers Point was the site of the first coalmining in Australia, which continued at the site until 1814.
- 1813 A coal-fired beacon and flagstaff was erected on Signal Hill to guide and warn mariners.
- 1822 A signalling station was erected and the place became known as Signal Hill.
- 1857 Henry Dangar recorded the name Tahlbihn Point at the site of Signal Hill on his map surveying the Hunter Region.
- 1880 During ongoing hostilities between Russia and England, the NSW Government seeks advice from Sir William Jervis and Lieutenant Colonel Peter Scratchley to advise on colonial defences.
- 1885 Construction began on permanent fortifications at Fort Scratchley. The guns were in position by 1882, and construction of accommodation for the troops followed.
- The old convict coal workings beneath the hill were sealed with a thick wall of concrete.
- 1942 Return of enemy fire from a Japanese submarine.
- 1945 Italian POWs are accommodated at Fort Scratchley for up to two years.
- 1950 A works depot was constructed for the Department of Housing and Works on the level area below the Fort along Nobbys Road.
- 1954 Fort Scratchley is used by National Service Scheme for militia training.
- 1972 The Australian Army vacates the site.
- 1977 The City of Newcastle given control of Fort Scratchley Site.
- 1982 Official opening of the military museum in the restored Commandant's Cottage.
- 1998 Formation of the Fort Scratchley Historical Society Inc.
- 2004 Fort Scratchley closed for conservation and reconstruction works.
- 2005 Convict coal mines below Fort Scratchley were re-discovered by the University's Coal River Working Party.
- 2008 Ownership of the Fort transferred from the Commonwealth Government to The City of Newcastle.

4.2 Cultural significance

The Heritage Management Plan identifies Fort Scratchley as having outstanding heritage significance according to the National Heritage List criteria including historic, rarity, scientific, representative, aesthetic, creative/ technical, social and associative. The assessment identifies Fort Scratchley as unique in Australia as the largest and most diversified and intact coastal fortress barracks complex.

The Heritage Management Plan also notes the importance of the significance of Fort Scratchley's setting, including the views to and from the site and the dramatic interface with the edge of the City. Further, Fort Scratchley is listed as part of the Coal River Precinct on the State Heritage Register. This highlights the importance and need to maintain the significance of the setting and manage the Fort in the context of its relationship with the broader associated historical sites.

4.3 Site overview

Fort Scratchley is a prominent headland situated south of the mouth of the Hunter River. The site comprises an inner fort, defined by a dry ditch, bridge and gates. The inner fort encompasses the gun emplacements, Battery Observation Post and associated fortress structures and underground tunnels, the Commandant's Cottage, the Barracks and associated buildings on the lower section. The inner fort precinct is the most important in terms of significant and original structures.

The outer fort encompasses a number of buildings, open space, car parking and the main entrance and driveway at Nobbys Drive. The buildings include the Master Gunner's Cottage and the Workshop and Multipurpose Centre, both of which were built in 2008.

There is significant open space to the east of the outer precinct adjacent to Nobbys Road. This area provides a small playground and bench seat for passive recreation and an overflow car park to the north. Formal car parking areas are located adjacent to the Master Gunner's Cottage and Multipurpose Centre.

There are substantial and important views to and from the site. Important views to the site include those from the corner of Parnell Place and Stevenson Place, the entry gates to the inner fort and flagstaff, Foreshore Park and Macquarie Pier. The elevated position of the Fort provides extensive views over the Hunter River, Nobbys, Foreshore Park and the City.

See figure 2 for a site layout.



Views over Nobbys



Views over City and Hunter River

4.4 Current uses

Fort Scratchley provides opportunities for a variety of uses, including guided tours, museum and events.

The site is open to the public six days a week from 10am to 4pm. General admission is free.

Tours

Visitors can take a self-guided tour around the barracks and above-ground defence structures. The Fort Scratchley Historical Society provides guided tours of the tunnels and the full site.

There are a number of buildings and rooms within the inner fort that are not open to the public.

Museum

Three of six rooms in the Commandant's Cottage are used as a military interpretation museum. The museum exhibits some of the Fort Scratchley Historical Society's collection of artefacts, illustrating life at the Fort since 1882, and Newcastle local and military history are displayed.

Souvenirs

There is a small gift shop located in the Artillery Store, within the inner fort.

Private Events and Functions

The site is available for hire for private events and functions including weddings, conferences and meetings.

Multipurpose Centre

The Multipurpose Centre caters for wedding receptions, meetings, conferences and product launches.

Barracks Rooms

The Barracks Rooms consist of two adjoining rooms and are available for hire.

Wedding ceremonies

Wedding parties have exclusive use of two ceremony locations to the north and east of the Parade Grounds.

Public events

There are a number of major events at Fort Scratchley each year including Labour Day, Australia Day, ANZAC Day and the Queen's Birthday. Activities at these events including firing the 'big guns', military re-enactments, military vehicle displays and raising and lowering of flags ceremonies.

Passive recreation

The Fort provides opportunities for passive recreation including picnics, kite flying and photography. A small playground is provided on the grassed area, near the Fort's entrance.

Figure 3 depicts the key buildings and rooms on the site. The table at Appendix B identifies the current use of the buildings.



Public events



Private events



Museum

4.4.1 Current site management

Council is the owner and manager of the Fort Scratchley Historic Site. Council manages guided tour bookings, site security, asset maintenance, marketing and promotion, tourism and functions and events.

No Council employees are assigned directly to Fort Scratchley, however, Council estimates that labour cost directly attributable to the Fort operations equals one full time position, although this is not costed to the Fort. Time allocated to the Fort includes events and function bookings, marketing, management, site repairs and maintenance coordination and financial

management.

The Newcastle Museum provides informal advice and assistance when requested by the Fort Scratchley Historical Society regarding curatorial and museum issues.

The Fort Scratchley Historical Society, through its volunteers, has managed the day to day operations of the Fort for over 20 years. Currently the Society controls visitor access within the Fort walls and museum, conducts restorations in the workshop, provides tour guides and gun crew and operates a gift shop on site. The Society is also active in coordinating and running public events and commemorating special occasions as well as firing the guns when large cruise and naval ships enter or exit the harbour. The volunteer effort is significant.

There is one contract in place as part of the management of the Site. Table 2 identifies the current status of the contract. There is currently no agreement in place between Council and the Society to acknowledge and formalise its presence and role on the site.

Casual licences are issued for functions such as weddings and events.

Table 2 Status of leases/ licences

Item	Lessee (or User)	Status
Site catering services for catered functions, official functions and café services	Blue Star Catering	5 + 5 year service contract from June 2009

4.4.2 Funding

Council's focus for operating the site has been to achieve a level of self sufficiency with revenue from visitors and commercial operations. Revenue has been steadily increasing over the past five years, but financial sustainability continues to be an ongoing issue, given the escalating costs of maintenance and conservation.

The Fort Scratchley Historical Society has been instrumental in raising funds for the site, securing grants for major projects including museum establishment and gun restoration.

However, additional funding is required to ensure that Council, as owner of the state significant site, meets its statutory obligation to maintain, preserve and ensure

the site's security for future generations. This requires a proactive approach to maintenance and conservation works to avoid costly remediation programs in the future.

There is potential for higher annual revenue growth with an increased marketing effort for events and functions, as well as guided tours. Expansion of the number and types of activities on the site may also provide potential for greater revenue returns. Such opportunities however, will be very much determined by the resource capacity of Council and volunteers.

4.5 Condition of buildings and land

Fort Scratchley contains a complex of buildings and structures including gun emplacements, fortress structures and underground tunnels. The Heritage Management Plan included a comprehensive condition audit of the Fort's built assets prior to its transfer to Council in 2008.

The condition audit included in this Plan was undertaken in 2009 and focuses on the main buildings on the site. A detailed condition audit of all assets (including military installations) is beyond the scope of this Plan. This Plan recommends that when funds become available, a suitably qualified consultant be engaged to undertake a condition audit of all Council's assets at the Fort as the basis for the development of an asset management plan.

Refer to Appendix B for a complete description of the current condition and use of the assets located within the site

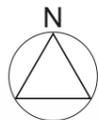


Figure 2 - Site Layout
FORT SCRATCHLEY



LEGEND

- - - Fort Scratchley boundary
- Building footprint
- Roadway and parking
- Open lawn area
- Vegetated embankment



Maps prepared by The City of Newcastle Landscape Architectural Services for the Fort Scratchley Plan of Management - July 2012

LEGEND

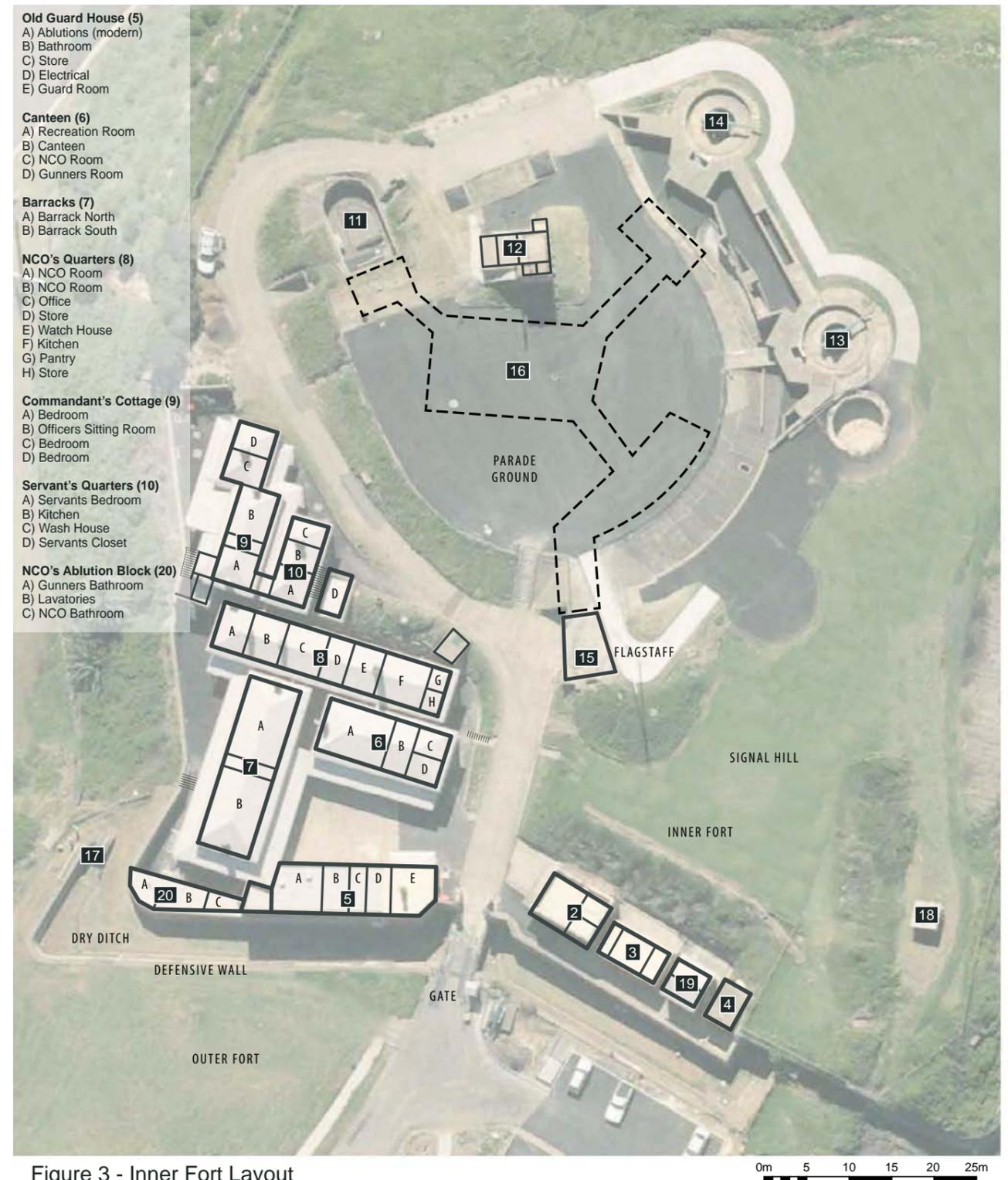


Figure 3 - Inner Fort Layout
FORT SCRATCHLEY



LEGEND

- Building
- A Room



Maps prepared by The City of Newcastle Landscape Architectural Services for the Fort Scratchley Plan of Management - July 2012

5.0 Planning context

5.1 Legislative requirements and relevant planning documents

5.1.1 Local Government Act 1993

Community land must be managed according to the *Local Government Act 1993* and the Local Government (General) Regulation 2005.

The Act requires all Council owned land to be classified as either Operational Land or Community Land. Community Land is defined as land that is set aside for community benefit. Community Land cannot be sold. Development and use of Community Land is subject to strict controls set out in the Act. In addition to these controls, Community Land is required to be managed in accordance with a plan of management.

Local Government Act requirements:

In General

All community land must be categorised

Contain core objectives and performance targets for management of the land

The means by which these strategies will be achieved

The methods which will be used to assess whether the strategies are being achieved

A plan of management that applies to just one area of Community Land, as this one does, must also include a description of:

The condition of the land, and any building or other improvements on the land

The use of the land and any such buildings or improvements

Specify the purpose for which further development of the land will be permitted, whether under lease or licence or otherwise

Describe the scale and intensity of any such permitted use or development

Categorisation of land

The Act requires all areas of Community Land be categorised in accordance with the Act's nominated categories of Natural Areas, Park, Sportsground, Cultural Significance and General Community Use.

The categories given to Fort Scratchley Site in this plan of management are:

- Cultural Significance
- Park
- General Community Use

The category boundaries are identified in figure 4.

Further information relating to the Act, including a description of land categories and their core objectives, is included in Appendix E.

5.1.2 Other State or Commonwealth legislation and planning controls

In addition to the requirements of the Act, there are a number of other pieces of legislation and Government policies that are relevant to the ongoing management of Fort Scratchley.

5.1.3 State Government legislation and policies

Heritage Act 1977

Fort Scratchley is listed as part of the Coal River Precinct on the NSW State Heritage Register and is thus subject to the relevant provisions of the *Heritage Act 1977 (NSW)*. The Heritage Act contains measures for the protection of listed sites, including requirements for maintenance, preparation of Heritage Management Plans, and approval of works with the potential to have an adverse impact on heritage values.

The effect of listing an item on the State Heritage Register is that a person cannot damage, destroy, alter or move the item, building or land without approval from the Heritage Council. The Heritage Act enables the Heritage Council to provide exemptions from its approval requirements under certain conditions.

Environmental Planning and Assessment Act 1979

The *Environmental Planning and Assessment Act 1979 (EP&A Act)* establishes the statutory planning framework for environmental and land use planning in NSW and provides local government with the power to protect items and places of heritage significance in their local area through Local Environmental Plans and Development Control Plans (DCPs).

LEPs include a heritage schedule (schedule 5.0) and standard heritage provisions (Part 5.10) that set out when development consent is and is not required for heritage items. DCPs can specify development standards and requirements in heritage conservation areas. The Newcastle Development Control Plan 2012 provides controls based on best practice that



FORT SCRATCHLEY - PLAN OF MANAGEMENT
Figure 4: Community Land Categories

LEGEND

- Culturally Significant
- Park
- General Community Use



support the adaptation, alteration and modification of structures and buildings that are listed as heritage items in Schedule 5 of the Newcastle Local Environmental Plan 2012 (LEP).

5.1.4 Council's strategic documents and policies

Integrated planning and reporting

Plans of management are embedded within Council's Integrated Planning and Reporting Framework, which is a legislative requirement. The strategies outlined in this plan of management are consistent with the community's vision and strategic directions in Council's Community Strategic Plan, Newcastle 2030.

Newcastle 2030 Community Strategic Plan

The Newcastle 2030 Community Strategic Plan is a shared community vision developed to guide policies and actions throughout the City for the next 20 years. The City of Newcastle developed the vision and strategic directions in Newcastle 2030 in partnership with the community.

The strategic directions and objectives identified in Newcastle 2030 that are particularly relevant to the Fort Scratchley Plan of Management include:

Vibrant and Activated Public Places

3.2 Culture, heritage and place are valued, shared and celebrated

Caring and Inclusive Community

4.3 A creative, culturally rich and vibrant community

Liveable and Distinctive Built Environment

5.1 A built environment that maintains and enhances our sense of identity

Smart and Innovative City

6.3 A thriving city that attracts people to live, work, invest and visit

Open and Collaborative Leadership

7.3 Active citizen engagement in local planning and decision-making processes and a shared responsibility for achieving goals

Newcastle Local Environment Plan 2012

The Newcastle Local Environment Plan 2012 (LEP) is Council's principal land use document and controls the use of land primarily through zoning. The provisions in a plan of management must be consistent with the zoning of the land.

The LEP identifies the site within the RE1 Public Recreation Zone. The objectives of the zone are:

- To enable land to be used for public open space or recreational purposes.

- To provide a range of recreational settings and activities and compatible land uses.
- To protect and enhance the natural environment for recreational purposes.

Fort Scratchley's status as a heritage significant item in the LEP and its inclusion within the Newcastle East Heritage Conservation Area provides a strong framework for the future management and development of the site. The requirements for development approval are governed by heritage conservation provisions, rather than the general provisions of the zoning of the land (LEP Section 5.10).

Newcastle Heritage Policy 2013

The purpose of the policy is to provide a statement of commitment by The City of Newcastle to the principles of heritage conservation. The Policy underpins the identification, preservation, conservation, celebration and promotion of the City's rich cultural heritage, based on the principles of the Burra Charter and best practice.

Council is committed to:

- **Protecting** our heritage through the production of guidelines that are based on world's best practice and technical expertise.
- **Supporting** our heritage through leading by example by strategically managing heritage assets under Council's care and control and seeking external sources of funding for heritage projects across Council.
- **Promoting** our heritage by encouraging high quality interpretative treatments of heritage places to increase understanding of the heritage significance, collaborating with stakeholders in activities that celebrate and increase awareness of Newcastle's heritage and promoting the heritage of Newcastle as a drawcard for tourism and film activity, creativity and design innovation, and as a generator of economic development.

5.1.5 Other plans and policies

Fort Scratchley Historic Site Heritage Management Plan 2008

The Heritage Management Plan was developed to satisfy the requirements of both the *Environmental Protection and Biodiversity Conservation Act 1999* (pre-transfer from the Commonwealth to Council) and the *NSW Heritage Act 1977* (post transfer).

The Heritage Management Plan provides a basis for decision-making regarding the heritage conservation and ongoing management of the site, including buildings and other structures in the site specifically

and the site generally. The Plan includes policies for appropriate use of individual elements, in order to provide a framework for future heritage management and conservation.

The general conclusions of the Heritage Management Plan with particular relevance to this plan of management are:

- Future and long-term use of the complex, including potential disposal of non-significant elements, should be conditional on adoption of the policies outlined in the Plan.
- Future management strategies, acquisition of exhibits, interpretation displays, conservation and maintenance works should be based on the Plan. Any proposals to carry out works not covered by the Plan, or the standard exemptions outlined in the plan are to be guided by consultation with suitably qualified and experienced professionals and appropriately qualified tradespeople.
- The former military functions of Fort Scratchley and its component parts should be explained through the ongoing care and conservation of significant fabric and suitable interpretive measures, in accordance with the *Fort Scratchley Heritage Interpretation Works Plan 2008* (International Conservation Services).
- Future interpretive displays and collections within the areas accessible to the public should be related to the history and development of Fort Scratchley, Newcastle military heritage, and military associations of former serving personnel in the local community. Refer, *Fort Scratchley Heritage Interpretation Works Plan 2008* (International Conservation Services).
- Commercial opportunities should be exploited under strict conditions outlined in the Plan, to ensure adequate self funding for future maintenance and repair works.
- Future development and adaptive reuse of buildings will be strictly controlled.

This plan of management has been developed consistent with the recommendations and policies outlined in the Heritage Management Plan.

Coal River Precinct Conservation and Cultural Tourism Management Plan July 2008

The Coal River Precinct Conservation and Cultural Tourism Management Plan addresses the area known as the Coal River Precinct defined by the boundaries identified in the NSW Heritage Council's listing and includes Fort Scratchley in addition to Nobbys,

Macquarie Pier, Nobby's Beach Pavilion, Soldiers Baths and Beach, Pilots Station, Boat Harbour, Boat Shed.

Key issues and recommendations raised by the Plan include:

- The protection and exploitation of views, notably the Obelisk, Fort Scratchley and Nobbys.
- Creating an awareness of the Precinct's significance and meanings through interpretation and promotion.
- Infrastructure works, interpretation, signage and landscaping within the Precinct to conform to the Burra Charter of Australia.
- A City-wide experience marking the precinct as a focal point for understanding Newcastle's physical birthplace and character.
- Implementation of five themes to understand the significance of the Precinct and the basis for interpretation (Fort Scratchley identifies with the 'protecting the colony' theme).
- The establishment of a productive relationship between Council and the Fort Scratchley Historical Society in the management of the Fort.
- Specific provisions for the Precinct in the DCP.
- Establishment of a separate heritage area in the DCP and LEP.

5.2 Review of the 2008 Plan of Management

The last plan of management for Fort Scratchley Historic Site was adopted by Council in 2008. The objective of the 2008 Plan was to 'conserve and promote the cultural significance, community use and park values of the Fort Scratchley Historic Site'.

As part of the process of preparing this new plan of management, the actions of the 2008 Plan have been reviewed and audited. Approximately 70% of the Plan's 86 actions are either complete, ongoing, in progress, partially complete or underway in 2013. The remainder of the actions are incomplete and may no longer be relevant or were unable to be funded.

An audit of the 2008 Plan of Management's implementation to date is provided in Appendix A.



6.0 Basis for management

The future management, use and development of Fort Scratchley is based on a number of considerations including legislative requirements and existing planning or policy directions, the Fort's values, the issues and/or challenges impacting the Fort, the community's aspirations for the future and the objectives set by the land categorisation (under the Local Government Act 1993) applicable to the site.

6.1 Legislation and policy framework

In addition to the requirements of the Act, this plan of management must comply with all other relevant legislation and policy as outlined in Section 4.0.

6.2 Values

Values are elements that make a place important to the community. A plan of management is a value-based document, developed in partnership with the community and stakeholders where key values are identified so that they may be protected and enhanced.

The Heritage Management Plan identified the cultural heritage significance of the Fort based on the National Heritage List criteria. These are essentially the values that can be attributed to place and must be protected and where possible enhanced.

The values for Fort Scratchley are therefore based on the heritage significance identified in the Heritage Management Plan. There were a number of additional elements identified by the community under a number of the values, which have been added.

Set out below is a short description of the values provided in the Heritage Management Plan.

Historic

The site has historic value because of its importance in the course, pattern of Australia's cultural history. The site has historical associations dating to the earliest convict settlement and was the source of the first coal deposits mined in the region. Fort Scratchley has been the site for navigational control of the port of Newcastle and a range of permanent defence installations, representing over 110 years of military presence. The site has the added distinction of being the only Australian fort to have fired at an enemy surface target.

Fort Scratchley, with its working guns, is a unique military historical site.

Rarity

The site is important as a rare example of a closed coastal battery fortress as evidenced in the planning as a defensive complex and in the fabric of the place.

Scientific

The site has scientific value because of its potential to yield information relating to the organisational structure of coastal defence in Australia between 1820 and the mid 20th Century.

Representative

The site has value because of its importance in demonstrating the principal characteristics of a class of Australia's cultural places. The design and planning of the site clearly continue the Colonial closed fortress concept which reflected British design precedent, imported by Lieutenant Colonel Scratchley and Colonel Jervois.

Aesthetic

The site is important in exhibiting aesthetic characteristics and a high degree of technical achievement. The Fort has aesthetic value both for its geographic location and physical form. The elevated site is set against a backdrop of spectacular coastline to the east and views panoramic of the city and Hunter River to the south and west. Further, there is an important line of sight to other military installations such as Shepherds Hill and Fort Wallace

The Fort demonstrates a classical military aesthetic with an intact 19th Century battery complex, associated barracks buildings and military structures enhanced by its spectacular coastal headland position.

Technical

The site demonstrates a high degree of technical achievement, exhibiting a range of defensive technology innovations over a period of 110 years. The military features of particular note include the Shell Lifts, Tunnel Lighting, Casemate Lighting, Gun Control Systems, Battery Observation Post and Mines Firing Station Observation Post.

Social

The site has social value due to its importance to the defence personnel who were trained or stationed

at the complex in its 90 years of operation and to military historians. The site is important to the people of Newcastle as a major tourist attraction and as a complex with major scenic and historical qualities.

The role of the Fort Scratchley Historical Society is valued aspect of the site, most notably their knowledge, experience and engagement with visitors.

Associative

The site has value because of its association with the military planning and design of British Military Engineering specialist, Lieutenant Colonel Scratchley, and Colonel Jervois.

Listed on the State Heritage Register as part of the Coal River Precinct, it is important that the values identified for Fort Scratchley are viewed and managed within its broader geographical and historical context.

6.3 Community consultation

Consultation was undertaken with key stakeholders of the Fort, industry groups and the broader community to ascertain site values and the potential opportunities for future management and use.

The key outcomes from the consultation are as follows:

Values

Fort Scratchley is well regarded by the community, most notably the following elements:

- The experience and engagement with visitors provided for by the Fort Scratchley Historical Society
- The site as a tourist attraction
- A unique military site complete with working guns
- Elevated position overlooking the City and line of sight to other military sites

Opportunities

In terms of opportunities identified for the site, the key priorities were related to marketing and promotion and specifically the need for publicity, use of social media and development of package tours. A second priority was to enhance the visitor experience. A potential means for achieving this included offering a broader program of experiential events and activities considered compatible with the site, such as overnight stays, ghost tours and dramatic performances.

The outcomes from these consultations are outlined in Appendix D.

6.4 Key issues

Key issues for Fort Scratchley have been identified through:

- stakeholder and community consultation
- a review of the 2008 Plan of Management, Heritage Management Plan and associated operational documents
- on-site inspections and assessments

The key issues can be grouped under the following broad headings:

Heritage management

- Significant financial challenges associated with the physical deterioration of the site.
- Resources and skills to manage and conserve a heritage site of the Fort's complexity.
- A number of the recommendations in the Heritage Management Plan have not been prioritised or implemented.
- A lack of a proactive and prioritised maintenance schedule for conservation and maintenance of the building fabric and moveable assets in accordance with the policies identified in the Heritage Management Plan.
- A need for internal service level agreements in place as the basis for onsite maintenance.
- Not all assets at the Site have been identified and included in Council's asset management systems.
- Outdated information on the condition of assets.
- Security and vandalism.
- The Heritage Management Plan was developed in 2008 and was recommended for review within five years.
- Fort Scratchley is not listed on the National Heritage Register.

Governance and resources

- Long-term sustainability of the site in terms of human and financial resources.
- The need for a business plan.
- Succession planning for the Fort Scratchley Historical Society.
- The need to develop a formal agreement for the Fort Scratchley Historical Society in conducting operations at the Fort.
- The need for an on-site manager to oversee operations and support the Fort Scratchley Historical Society.

- The need for a Fort Scratchley Management Advisory Committee as per the recommendation in the 2008 Plan of Management and Heritage Management Plan.

Collection management

- A lack of on-site storage.
- The need to complete cataloguing of moveable heritage items.
- Storage of artefacts and other items in rooms within the inner fort with high level significance, contrary to the Heritage Management Plan.

Cultural tourism

- The Fort remains primarily focused as a single military showpiece, limiting the scope for return visits for other experiences.
- The opportunity to present the Fort as a museum within its own right.
- The Fort Scratchley Historic Site Interpretation Work Plan 2008 has not been fully realised.
- Development of the museum is only partially complete due to limited funding.

Visitor experience

- Development consent restrictions on evening trade (the Multipurpose Centre cannot be used after 10pm on weeknights).
- No onsite food and beverage options.
- The need for greater publicity and promotion for the site.
- Cost to hire the Multipurpose Centre makes it inaccessible to some.

Infrastructure

- Weed control
- Incidence of landslip on Fort Drive.
- Uncontrolled parking on grassed area along Nobbys Road.



- Inadequate parking during peak times.

- Different styles of park furniture (including waste bins)



6.5 Vision and principles for management

A vision for Fort Scratchley has been developed as the basis for the development of the plan of management. The vision outlines the intended role and character envisaged for the Fort.

Fort Scratchley is a nationally significant, unique cultural and community experience reflecting an operating fort.

The following set of management principles are taken from the 'general principles' in the Heritage Management Plan. They provide broad statements of management intent and priority to guide both identified management actions as well as management decisions responding to unforeseen situations and challenges.

- To retain and conserve the site in accordance with the Burra Charter of Australia and its associated guidelines.
- To manage the site with the primary objective of enhancing the military heritage by explaining the history and significance of the Fort, supported by interpretive displays that demonstrate the functioning of individual components.
- To present and interpret the site's significance in

Newcastle's earlier history (penal settlement, coal mining and port activities).

- To have primary regard for physical conservation and interpretation. The site should become financially self supporting, however, it should not be required to yield a return on funds invested.
- To retain and conserve all buildings, structures and landscape elements in the inner Fort precinct.
- To manage the grounds of the site as an integral part of the place. The bare open nature of the setting should be maintained although some former elements may be introduced for interpretive or operational reasons. New elements should only be introduced where essential for the site's operation.
- To maintain and where possible enhance significant views to and from the site.
- To maintain and where necessary preserve and restore the fabric of built elements.
- Sympathetic adaptation may occur to assist in interpretation of the operation of the place. Intervention in significant fabric should be minimal and reversible wherever possible.
- To curate and conserve collections of moveable artefacts in an appropriate manner.
- To interpret the site in a manner that presents its significant attributes, particularly the major phases of its history and development.

6.6 Objectives

6.6.1 Categorisation and objectives (from the Act)

Cultural Significance

Retain and enhance the cultural significance of the areas for past, present or future generations by the active use of conservation methods.

Park

Encourage, promote and facilitate recreational, cultural, social and educational pastimes and activities.

Provide for passive recreational activities or pastimes and for the casual playing of games.

Improve the land in such a way as to promote and facilitate its use to achieve the other core objectives for its management.

General community use

Promote, encourage and provide for the use of the land, and to provide facilities on the land, to meet the current and future needs of the local community and of the wider public:

(a) in relation to public recreation and the physical, cultural, social and intellectual welfare or development of individual members of the public, and

(b) in relation to purposes for which a lease, licence or other estate may be granted in respect of the land (other than the provision of public utilities and works associated with or ancillary to public utilities).

6.6.2 Management Objectives

1. Recognise and promote Fort Scratchley as a site of outstanding cultural significance and national importance.
2. Actively conserve and manage the Fort's heritage values through appropriate maintenance and repair.
3. Establish and maintain a governance structure appropriate to the Fort's significance and complexity.
4. Provide adequate resources to ensure the long-term sustainability of the site.
5. Retain and conserve moveable items in accordance with accepted principles and guidelines.
6. Provide a cultural tourism experience based on the Fort's unique cultural heritage values.
7. Provide ways for visitors to enjoy the experience and develop an understanding and appreciation of the Fort's heritage values and the need to conserve and manage these values.
8. Suitably manage and conserve the natural and cultural significance of the Fort's landscape and setting.
9. Provide for passive recreational activities that complement the Fort's cultural heritage and natural setting.
10. Promote the site in a manner that enhances public appreciation of the site's heritage values, while enhancing the quality of the visitor experience and maximising economic returns from visitors.
11. Provide unique experiences and opportunities to encourage broad and repeat visitation.

7.0 Management directions and actions

This section sets out the management directions and strategies that Council will implement to realise the vision and key objectives for Fort Scratchley.

7.1 Future Use and Development

A plan of management is required to outline the future use and development that will be permitted within Fort Scratchley. It is not possible or practical to envisage all possible uses that could potentially occur at Fort Scratchley. Purposes for which Community Land will be permitted to be used or developed in future are:

- activities and developments permitted under the Newcastle LEP
- purposes consistent with the core objectives for the relevant category of land under the Act (refer to section 6.6.1)
- purposes consistent with the policies of the Heritage Management Plan
- purposes consistent with the key objectives and values in this plan of management

The Heritage Management Plan identifies five zones of permissible development (see Figure 5 and Appendix C). Any proposals for new development, modifications and or adaptive reuse should be in accordance with the level of development specified.

7.2 Leases, licences and other estates

In accordance with the Act, a plan of management must expressly authorise the granting of any lease, licence or other "estate" over Community Land. Council may lease and licence Community Land in a plan of management consistent with the categorisation and core objectives of the particular area of the Community Land.

A lease is generally provided where exclusive use of all or part of an area is required due to the scale of investment or security measures.

Licences provide for the short term occupation or control of all or part of an area. A number of licences can apply to the same site at the same time, provided that there is no conflict between them.

Leases and licences over Community Land must follow the requirements of the Act for leases, licences and other estates.

7.2.1 Authorisation of current and future leases, licences and other estates

General

In considering whether to grant any lease or licence, Council will give consideration of and regard to:

- the provisions of the Newcastle LEP and other legislative requirements
- the categorisation and core objectives for the land
- the policies and guidelines in the Heritage Management Plan more specifically;
 - (i) Spaces assessed with a significance rating of 1 or 2 should be used for interpretation of the site. Any other activity proposed should be considered only if it can be demonstrated there is no potential impact on significant fabric or spaces, arising from such activity.
 - (ii) Spaces assessed with a significance ranking of 4 may be considered for essential management and operations purposes, but should otherwise be available for interpretation.
 - (iii) Spaces assessed with a significance ranking of 4 or 5 may be used for management, interpretation, concession or storage purposes
- the recommended uses for individual spaces outlined in the Heritage Management Plan
- any likely impacts on the site's heritage values and resources
- the developments identified as permissible within each of the five zones of permissible development (Appendix C)
- any likely impacts on the access, uses and experiences of other uses
- financial viability and enhancement of the visitor experience
- Council's policies for leasing and licensing

This plan of management expressly authorises leases, licences and/or other estates for purposes and uses which are identified or consistent with the following. Activities not listed will be considered on their individual merits using the criteria set out above.

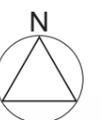
Purposes for which agreement will be granted		Note
Licence/Lease		
Land and buildings	Site catering	Spaces and buildings allocated in accordance with the Heritage Management Plan (Feasible Uses and Recommended uses for individual spaces)
	Retail uses associated with the facility	
	Conducting tours	
	Educational activities	
	Exhibitions	
	Volunteer support activities including administration and storage	
Short term casual licences		
Land and buildings	Concerts, cultural or community events	
	Public performances	
	Ceremonies (e.g. weddings, cultural events)	
	Commercial photography/ filming	
	Private functions	



Figure 5 - Heritage Map
FORT SCRATCHLEY

LEGEND	
	Development Zones
Heritage Significance	
	Exceptional
	High
	Moderate
	Low
	None
	Intrusive

- Development Zones
- 1 - Clear open space, no built development, no new permanent structures
 - 2 - No new structures or intrusive development
 - 3 - Limited development potential
 - 4 - Modifications only, outside view corridor
 - 5 - Potential redevelopment site



Maps prepared by The City of Newcastle Landscape Architectural Services for the Fort Scratchley Plan of Management - July 2012

7.3 Management action tables

The following Management Action Tables present a range of actions that will be pursued by Council and/or stakeholders over the coming five to 10 years. The actions will be assessed on an annual basis for inclusion in Council's four year Delivery Program. In addition, Council and stakeholders will be able to utilise the information contained within this Plan to seek external grant funding in order to resource some actions.

Management actions have been grouped in the following Management Action Tables:

- Heritage management
- Governance and resources
- Collection management
- Cultural tourism
- Infrastructure
- Visitor experience

The Management Action Tables include the following items

Performance targets or Strategies: these are the means by which Council proposes to achieve the Plan's key objectives.

Means of achievement or Actions: each strategy lists a number of actions or operational activities intended to achieve the strategy.

Means of assessment: the manner in which Council proposes to assess its performance with respect to the Plan's objectives.

Lead responsibility: refers to the Council Service Unit or in some cases other bodies (such as government agencies, volunteers or contractors) with primary responsibility for ensuring achievement of the performance target.

The following abbreviations relate to the City of Newcastle Service Units identified under the Lead Responsibility column:

CES	Commercial Enterprise Services
TEDS	Tourism and Economic Development Services
PRS	Parks and Recreation Services
IMS	Infrastructure Management Services
FS	Financial Services
GOV	Governance
FSHS	Fort Scratchley Historical Society
CRWP	Coal River Working Party

Potential funding sources: are identified for each of the actions. Funding for the actions will be subject to Council's annual budget and competing priorities. Funding sources might include staff time, volunteer time, Section 94 (development) contributions, grant funding, operating revenue, partnerships with other organisations and sponsorship.

Priority: gives an indication of the relevant importance and preferred timing of each action.

- **High** – Ideally the action will be undertaken within 1–3 years
- **Medium** – Ideally the action will be undertaken within 3–5 years
- **Low** – These actions to commence within 1–5 years, though completion may take longer than this timeframe
- **Ongoing** – The action will be carried out on a regular basis, or as required, for the duration of the Plan.

Heritage Management

7.3.1 Heritage management

Management principles

- To retain and conserve the site in accordance with the Burra Charter of Australia and its associated guidelines.
- To have primary regard for physical conservation and interpretation. The site should become financially self supporting, however, it should not be required to yield a return on funds invested.
- To retain and conserve all buildings, structures and landscape elements in the inner Fort precinct.
- To maintain and where necessary preserve and restore the fabric of built elements.
- Sympathetic adaptation may occur to assist in interpretation of the operation of the place. Intervention in significant fabric should be minimal and reversible wherever possible.
- To accommodate the management needs of the site within existing buildings in the inner Fort precinct and not erect new structures within this area.

Management objectives

1. Recognise and promote Fort Scratchley as a site of outstanding cultural significance and national importance.
2. Actively conserve and manage the heritage values of the site through appropriate maintenance and repair.

Alignment with Community Strategic Plan strategies

- Maintain the unique built and cultural heritage of the city by encouraging the adaptive re-use or recycling of heritage buildings and giving formal protection to those items or areas of major heritage significance.

Topic	Strategy	Means of Achievement (Management actions))	Means of assessment	Lead responsibility	Potential funding source	Priority	HMP policy
Heritage listing	To have Fort Scratchley (as part of the Coal River Precinct) placed on the National Heritage List.	HM.1 Support the University of Newcastle Coal River Working Party bid for the Coal River Historic Site to be placed on the National Heritage List to improve its tourist status and attract increased funding opportunities and further study by scholars and researchers.	Coal River Precinct (including Fort Scratchley) listed on the National Heritage Register.	CRWP	In-kind partner to CRWP	High	
Heritage values	Identify gaps in knowledge of the heritage values of the site and address these gaps.	HM.2 Liaise with and utilise research undertaken by academics and research bodies including the University of Newcastle and Coal River Working Party.	Up to date information provided on the Fort Scratchley website and publications.	CES	Staff time	Ongoing	1.2
		HM.3 Where appropriate, publish the results of research that provides additional information relating to the heritage values of the site, and provide access to information collated in data bases.	New material added to the Fort Scratchley website.	CES	Staff time	Ongoing	
Knowledge	Explore the potential for partnerships with local and regional organisations with related interests such as heritage conservation or education activities in order to advance the practice and performance of the management of the site.	HM.4 Maintain and extend partnership arrangements with conservation management agencies and specialists, academic and community organisations.	Effective networks established to assist management of the site.	CES	Staff time	Ongoing	
		HM.5 Continue to engage with Newcastle Museum in the provision of curatorial expertise.		FSSS/ Museum	Staff and volunteer time	Ongoing	
	Ensure that plans relating to the management of the site are accessible.	HM.6 A copy of the Heritage Management Plan and Plan of Management plus secondary plans should be held at the Fort, available on the website and copies provided to all stakeholders operating on the site.	Planning documents are referred to in the day to day operation of the site.	CES	Staff time	High	
Asset Management	Develop and maintain an Asset Management Plan for the site to meet the required level of service in the most optimal way.	HM.7 Ensure that all Council owned assets within the Fort Scratchley Site have been identified in Council's asset register.	An asset register of Council owned assets is maintained and regularly updated.	IMS	Staff time	High	
		HM.8 Engage a heritage consultant to undertake a condition audit of all Council's assets as the basis for prioritising maintenance and conservation works	All Council owned assets assigned a condition rating.	IMS	Operating revenue	High	
		HM.9 Develop appropriate levels of service based on demand and customer expectations to inform and prioritise future works programs.	Service levels developed and used to inform and prioritise future works programs.	IMS	Staff time	High	
		HM.10 Establish a sinking fund for the site, investing monies collected from tours, events and donations etc made via the Trust (see GR.4)	A sinking fund in place for Fort Scratchley.	CES/FS	Staff time	Medium	

Topic	Strategy	Means of Achievement (Management actions))	Means of assessment	Lead responsibility	Potential funding source	Priority	HMP policy
Cyclical Maintenance	Develop a five-year maintenance program, as part of the Asset Management Plan.	HM.11 Develop a prioritised program of maintenance for individual structures, spaces and elements based on the condition audit and the recommendations in the Heritage Management Plan (including checklist for critical maintenance).	A five-year Cyclic Maintenance Program developed and implemented for Council owned assets.	CES/ IMS	Operating budget	High	
Capital Works	Develop a Capital Works Program as part of the Asset Management Plan.	HM.12 Develop a Capital Works Program to appropriately conserve the built, archaeological, natural and landscape elements of the site based on the statement of significance together with the recommendations for specific items in the Heritage Management Plan.	A Capital Works Program developed and implemented.	CES/ IMS	Operating budget/ Grants funding	High	1.8, 1.9, 2.2
		HM.13 Provide for regular update to include ongoing maintenance and conservation works, as well as any additional information about the historical evolution or physical fabric.		CES/ IMS	Staff time	Ongoing	
Reactive maintenance	Identify and repair damage or defective items in a timely manner to prevent further deterioration.	HM.14 Implement (where applicable) the weekly checklist for critical maintenance outlined in the Heritage Management Plan.	Critical maintenance identified and addressed in a timely manner.	CES	Operating budget	Ongoing	
		HM.15 Ensure all stakeholders on site are aware of their obligations to report required maintenance to appropriate management personnel.		CES	Staff time	Ongoing	

Topic	Strategy	Means of Achievement (Management actions)	Means of assessment	Lead responsibility	Potential funding source	Priority	HMP policy	
Conservation Works	Ensure conservation works are undertaken in accordance with best practice principles.	HM.16	Undertake conservation works in accordance with the principles and guidelines in the Burra Charter of Australia (ICOMOS), the requirements of the Heritage Management Plan and in consultation with Council's Heritage Officer and the Heritage Branch of NSW.	Fabric sympathetically and appropriately managed in accordance with best practice principles outlined in the Burra Charter, the Heritage Management Plan and the advice of Council's Heritage Officer.	CES	Grant funding	Ongoing	1.1, 1.3, 1.4, 1.5, 1.6, 1.7, 1.8, 1.9, 2.2 10.1 – 10.5 11.1-11.9 12.10-12.11
		HM.17	Where applicable, seek approval for conservation works from the Heritage Branch of NSW and/or the Heritage Council of NSW.	Fabric sympathetically and appropriately managed in accordance with best practice principles outlined in the Burra Charter, the Heritage Management Plan and the advice of Council's Heritage Officer.	CES	Staff time	Ongoing	
	Undertake conservation activity on the basis of a priority system.	HM.18	Establish a system for prioritising conservation work that considers the following criteria – urgent threats to safety, statutory requirements, the cultural significance, condition and vulnerability of the element, any potential for alternative use of the element, the cost of conservation projects and works and the resources available.	Conservation works prioritised and implemented in accordance with an agreed criteria.	CES/ IMS	Staff time	High	1.2
		HM.19	Seek to establish access to personnel with expertise in heritage conservation. This might include a combination of internal skills, establishment of an Advisory Committee (see GR.6) and partnership arrangements with academic and community organisations such as the National Trust of Australia (NSW).	Identification and implementation of conservation work is undertaken with the direction of relevant heritage advice.	CES	Staff time	Medium	
	Management of the site requires access to a broad range of specialist conservation skills.	HM.20	Ensure conservation works, including design documentation is undertaken by appropriately qualified and experienced consultants and tradesman.	Best practice methodology employed for conservation works.	CES	Operating budget	Ongoing	
Visitor levels	Monitor levels of visitation to ensure that the use of the place does not result in damage at unacceptable levels of wear to significant elements.	HM.21	Visitor numbers, visitor profiles and management impact on Fort Scratchley should be formally monitored and the results used to modify management practice.	Data regarding visitor numbers collated and utilised to modify management practice.	CES/ FSHS	Staff time	Ongoing	2.9

Governance and resources

7.3.2 Governance and resources

Management principles

- To have primary regard for physical conservation and interpretation. The site should become financially self supporting, however, it should not be required to yield a return on funds invested.

Management objectives

3. Establish and maintain a governance structure appropriate to the Fort's significance and complexity.
4. Provide adequate resources to ensure the long-term sustainability of the site.

Alignment with Community Strategic Plan strategies

- Build strong partnerships between the community, business and all levels of government to support the implementation of Newcastle 2030.
- Provide opportunities for genuine and representative community engagement in local decision-making.
- Ensure long-term financial sustainability through short, medium and long-term planning.
- Actively foster a spirit of participation and volunteering by addressing key barriers and developing appropriate policy responses to address these barriers.

Topic	Strategy	Means of Achievement (Management actions)	Means of assessment	Lead responsibility	Potential funding source	Priority	HMP policy	
Governance model	Establish a management structure for the Fort which ensures the highest standard of planning, operation and maintenance.	GR.1	Research and establish an appropriate governance model for the Fort. Consider one or a combination of the following: <ul style="list-style-type: none"> Establishment of a Trust (Board/ Foundation) Dedicated Site Manager Lease to commercial entity with social/ cultural outcomes identified in the lease. 	A suitable management structure for Fort Scratchley in place.	GOV/FS/ CES	Staff time Operating revenue	High	3.1, 3.2, 3.5
		GR.2	Prepare the relevant Council policies and legal documents to formalise the establishment of any independent management body.	Formalised management structure in place	GOV	Staff time Operating revenue	High	
	Establish the most suitable department within Council for the management of Fort Scratchley within Council's structure.	GR.3	On determination of the overall governance model, establish where within the Council structure, management responsibility for Fort Scratchley should lie.	Management of the site undertaken and appropriately resourced by the most appropriate section of Council.	GOV	Staff time	High	
Fort Scratchley Trust	Consider the implementation of a Fort Scratchley Trust.	GR.4	Investigate the feasibility of establishing a Fort Scratchley Trust or other appropriate mechanism to deliver long-term financial sustainability through donations and sponsorships.	The feasibility of creating a Trust and Friends Program as a potential management model and fund raising opportunity established and implemented (if applicable).	GOV/FS/ CES	Staff time Operating revenue	Medium	
		GR.5	Investigate the potential for a 'Friends of the Fort' program to connect the community to the Fort and raise money to support the Trust.		GOV/FS/ CES	Staff time Operating revenue	Medium	
Advisory Body	Look at the feasibility of establishing an Advisory body to provide expert advice and oversee the implementation of this Plan.	GR.6	Investigate the establishment of an Advisory Committee within the broader governance framework for Fort Scratchley. Membership of the Committee might include Council, FSHS, National Trust of Australia (NSW) and additional expert membership from the fields of heritage conservation, architecture, history and curation.	The feasibility of setting up an Advisory Committee established and implemented (if applicable).	GOV/CES	Staff time	Medium	3.3, 3.4
		GR.7	Establish a role for the Advisory Committee, which amongst other things include overseeing the implementation of the plan of Management, monitoring outcomes, providing conservation advice to the site manager, reviewing management policies and approaches to the site.		GOV/CES	Staff time	Medium	
		GR.8	Continue to support an Operational Committee in the current or future management model for Fort Scratchley to identify critical maintenance, oversee implementation of this plan of Management, Cyclic Maintenance and Capital Works Program.		Ongoing resourcing for the Operational Management Committee.	CES	Staff time	Ongoing

Topic	Strategy	Means of Achievement (Management actions)	Means of assessment	Lead responsibility	Potential funding source	Priority	HMP policy	
Fort Scratchley Historical Society	Formally support and publicly acknowledge the substantial work undertaken by the Fort Scratchley Historical Society.	GR.9	Develop an appropriate lease or licence agreement between Council and the FSHS for the delivery of services, and utilisation of spaces at the Fort.	Lease/licence in place, clearly outlining the roles and responsibilities of Council and the Historical Society.	CES/GOV	Staff time	High	
		GR.10	Clarify and document the roles and responsibilities of the Council and the FSHS in context of the broader governance model.		CES/GOV	Staff time	High	
	Support the Fort Scratchley Historical Society to ensure long-term sustainability of their operations.	GR.11	Assist the FSHS in securing more volunteers to undertake activities on site potentially through the 'Friends Program' and/or review current activities to accommodate available resources.	The Fort Scratchley Historical Society supported in its operations at the Fort for the longer-term.	CES	Staff time	Ongoing	
Leases and licences	Develop policies and procedures to clarify roles and responsibilities for lessees/licencees.	GR.12	Prepare a manual of procedures for decision making and approvals to ensure clarity in areas of responsibility and required consultative processes.	A procedural manual in place.	CES	Staff time	Low	3.6
	Improve the understanding of all site users of the policy framework which underpin utilisation and management of the Fort	GR.13	Ensure event organisers, businesses and volunteer activities are compliant with the Heritage Management Plan as an agreed condition to their presence on site.	All users inducted to site and aware of and operating in accordance to obligations identified in their lease/licence.	CES	Staff time	High	
		GR.14	Ensure a copy of the Heritage Management Plan and plan of management plus secondary plans are held on site.	Relevant documents utilised to inform decision making.	CES	Staff time	High	
	Ensure 'conditions of use' reflect policies outlined in the Heritage Management Plan.	GR.15	Review the conditions of use in lease and licence agreements and if necessary incorporate further conditions and requirements of the Heritage Management Plan.	Conditions of use in leases and licences reflect policy direction provided in the Heritage Management Plan.	CES/GOV	Staff time	High	
	Ensure leases and licences are issued in accordance with this plan of management.	GR.16	Develop policies and procedures for the assessment of proposed or renewable leases and licences in accordance with the 'authorisation of future leases, licences and other estates' outlined in section 6.2.1 of this plan of management.	Leases and licences assessed in accordance with this plan of management.	CES	Staff time	Medium	

Topic	Strategy	Means of Achievement (Management actions)	Means of assessment	Lead responsibility	Potential funding source	Priority	HMP policy	
Business Plan	Provide for more detailed business planning for the Fort.	GR.17	Develop a Business Plan for Fort Scratchley linked to actions in this plan of management.	Business Plan for Fort Scratchley in place.	CES	Staff time	Medium	
		GR.18	Review the pricing policy and structure in line with any proposed changes to product and service offering.	Pricing policy reflects product offering.	CES	Staff time	Ongoing	
Funding	Explore the potential funding opportunities in order to achieve Council's objective of financial sustainability for the Fort	GR.19	Explore the full range of funding grants and programs that might be applied for to assist in the management/ conservation of the Fort.	Potential funding opportunities identified for projects identified in the Capital Works Program.	CES/TEDS/FSHS	Staff/Volunteer time	Ongoing	
		GR.20	Investigate the full range of sponsorship opportunities that may be available through the public and private sector.		CES/TEDS/FSHS	Staff/Volunteer time	Ongoing	
	Explore the potential funding opportunities in order to achieve Council's objective of financial sustainability for the Fort	GR.21	Continue to pursue an appropriate level of commercial operations for the Fort based on activities and facilities that are complimentary to and enhance the heritage values of the site.	Potential funding opportunities identified for projects identified in the Capital Works Program.	CES	Staff time	Ongoing	2.3
		GR.22	Explore the potential for community contributions through appropriate mechanisms and programs i.e. establishment of a charitable Trust/ Foundation		CES/FS	Staff time	Medium	
		GR.23	Develop strategies to encourage the State and Commonwealth governments and others to commit regular and recurrent funding to enable Council to maintain best practice conservation management.		CES	Staff time	Low	
	Ensure that projects have been identified and prioritised in preparation for funding becoming available.	GR.24	Plan and prioritise projects within the Capital Works Program in readiness for grant applications.	Projects identified within the Capital Works Program.	CES/FSHS	Staff time	High	
Ensure monies associated with the operation of the site are reinvested back into the site.	GR.25	Establish a separate account, in order that monies received through the charitable trust and/or commercial activities on the site, can be channelled back into the conservation and operation of the Fort.	A separate account established for Fort Scratchley operations.	CES/FS	Staff time	Medium		

Topic	Strategy	Means of Achievement (Management actions)	Means of assessment	Lead responsibility	Potential funding source	Priority	HMP policy
Review and delivery	Ensure that the actions contained within this plan of management are reviewed and implemented.	GR.26	Annually review implementation of the actions contained in the plan of management over the previous year and set priorities for the following year in line with the Integrated Planning and Reporting process.	Implementation, monitoring and review of this plan of management is undertaken within Council's Integrated Planning and Reporting Framework	CES	Staff time	Ongoing
		GR.27	Annually report on delivery of the actions contained in this plan of management through the annual report.		CES/GOV	Staff time	Ongoing
		GR.28	Every four years, the actions contained in this plan of management shall be assessed and reported through the State of the City report.		CES/GOV	Staff time	Ongoing

Collection Management

7.3.3 Collection management

Management principles

- To curate and conserve collections of moveable artefacts in an appropriate manner.

Management objectives

- Retain and conserve moveable items in accordance with accepted principles and guidelines.

Alignment with Community Strategic Plan strategies

- Provide opportunities for formal and informal learning opportunities for residents.

Topic	Strategy	Means of Achievement (Management actions)	Means of assessment	Lead responsibility	Potential funding source	Priority	HMP policy
FSHS Exhibition	Exhibit moveable heritage in accordance with the Fort Scratchley Historic Site Exhibition Strategy for Moveable Heritage (2008).	CM.1 <ul style="list-style-type: none"> Identify and prioritise actions in the Fort Scratchley Historic Site Exhibition Strategy for Moveable Heritage (2008) in the Capital Works Program. 	Actions from the strategy for Moveable Heritage identified and costed in the Capital Works Program.	FSHS Supported by CES/ Museum	Volunteer/ Staff time	High	17.1, 17.2, 17.4
FSHS Collection	Ensure collection management is undertaken in accordance related policies and expert advice.	CM.2	Review and update the Collection Management Policy taking into consideration the 'Significance Assessment of the Collection, Fort Scratchley Historical Society' (Bill Storer 2011) and the Exhibition Strategy for Moveable Heritage (2008)	FSHS Supported by CES/ Museum	Volunteer/ Staff time	Medium	Medium
	Complete collection management.	CM.3	Complete the cataloguing of moveable heritage items (both Council and Society owned) including recording all artefacts and assessment of significance in accordance with the strategy for Moveable Heritage.	FSHS Supported by CES/ Museum	Volunteer/ Staff time	Medium	
	Remove inappropriate items from the collection.	CM.4	Seek alternative use of moveable heritage items deemed to be non-significant.	FSHS Supported by CES/ Museum	Volunteer/ Staff time	Medium	
Storage	Address the lack of storage at the site and make publicly accessible rooms currently used for storage.	CM.5	Explore opportunities for offsite storage of moveable items not being utilised for interpretive purposes.	CES	FSHS Supported by CES	Medium	2.5-2.8, 18.1, 18.2
		CM.6	Progressively work towards removal of collection material in buildings/rooms of high heritage significance in the inner fort in accordance with the Heritage Management Plan.	FSHS Supported by CES	FSHS Supported by CES	Medium	
Curation	Ensure curation at the Fort is undertaken in accordance with best practice.	CM.7	Support the FSHS to expand on the work already undertaken in the museum.	FSHS Supported by CES/ Museum	Staff/ volunteer time	Ongoing	
Museum	Complete the museum in the Commandants Cottage and Servants' Quarters.	CM.8	Develop a project brief for completion of the museum, prioritise in the Capital Works Program and seek funding opportunities.	FSHS Supported by CES	Staff/ volunteer time	High	

Cultural Tourism

7.3.4 Cultural Tourism

Management principles

- To manage the site with the primary objective of enhancing the military heritage by explaining the history and significance of the Fort, supported by interpretive displays that demonstrate the functioning of individual components.
- To present and interpret the sites significance in Newcastle's earlier history.
- To have primary regard for physical conservation and interpretation. The site should become financially self supporting, however, it should not be required to yield a return on funds invested.
- To manage the grounds of the site as an integral part of the place. The bare open nature of the setting should be maintained although some former elements may be introduced for interpretive or operational reasons. New elements should only be introduced where essential for the site's operation.
- To interpret the site in a manner that presents its significant attributes, particularly the major phases of its history and development.
- To retain the inner Fort precinct in its present configuration. Buildings, structures and spaces of greatest significance and interest should be made available for interpretation of the significance of the place.

Management objectives

6. Provide a cultural tourism experience based soundly on the Fort's unique cultural heritage values.
7. Provide ways for to enjoy the experience and develop an understanding and appreciation of the Fort's heritage values and the need to conserve and manage these values.

Alignment with Community Strategic Plan strategies

- Support the delivery of high quality cultural and artistic product from local, national and international sources.
- Support the cultural and creative industries to provide opportunities for participation, employment and skill building.
- Provide and support opportunities for participation in a variety of cultural events and activities by people of different age groups and life stages that enhance community wellbeing and social inclusion.



Topic	Strategy	Means of Achievement (Management actions)	Means of assessment	Lead responsibility	Potential funding source	Priority	HMP policy
Heritage values	Recognise and promote the national heritage values of the site	CT.1 <ul style="list-style-type: none"> • Review and consider new research, including site values identified by the Coal River Working Party in their submission for National heritage listing with a view to presenting further stories (including pre-fort history) 	Fort Scratchley reflects and communicates the cultural heritage values identified for the site.	CES	Staff time	Ongoing	2.1
Orientation	Consider creating an orientation space at the Fort to provide visitors with an overview of the site and the opportunities available.	CT.2 <ul style="list-style-type: none"> • Consider establishment of an 'orientation' space for the site in conjunction with an 'interpretation centre' in the outer fort. 	Feasibility of an orientation space established and implemented (if applicable).	CES	Grant funding/ sponsorship	Low	
Interpretation	Implement the Fort Scratchley Interpretation Works Plan 2008	CT.3 <ul style="list-style-type: none"> • Develop a program for the staged implementation of interpretation projects as part of overall Capital Works Program. 	An interpretation plan for Fort Scratchley that reflects the values of the site and meets visitor expectations.	CES	Staff time	High	1.1,1.2 15.1
		CT.4 <ul style="list-style-type: none"> • Carry out audience research into the popularity and effectiveness of site interpretation using a range of formal and informal mechanisms and incorporate into the Interpretation Plan. 					
	Improve interpretation utilising more contemporary museum practices	CT.5 <ul style="list-style-type: none"> • Alternative tour presentations to be considered including iphone application, MP3, audio self guided tours. 	Self-guided options made available.	CES/ FSHS	Operating revenue	Low	
	Provide an opportunity for interpretation of the non-military themes	CT.6 <ul style="list-style-type: none"> • Consider an interpretation centre, located in the 'outer-fort', possibly the Multipurpose Centre to outline the broader (non-military) context of the site. 	Feasibility of an interpretation centre established and implemented (if applicable).	CES	Grant funding	Low	
	In accordance with the Heritage Management Plan, focus on the presentation of the site itself and its history as the overriding priority.	CT.7 <ul style="list-style-type: none"> • Develop a prioritised program for making publicly accessible and interpreting rooms and buildings with exceptional or high significance. Include actions within the overall Capital Works Program. 	A high standard of on-site interpretation.	CES/ FSHS	Staff/ Volunteer time	Medium	2.5-2.8
	Identify and build on potential linkages with surrounding heritage elements to broaden the visitor experience.	CT.8 <ul style="list-style-type: none"> • Consider the linkages between the Fort and heritage elements near the site and Bathers Way. This might include directional signage, interpretive signage and walking guides. 	Relevant links established with relevant surrounding heritage elements.	CES/SPS/ CRWP	Grant funding Partnership	Low	
Signage	Provide interpretative signage on site in accordance with the Interpretation Strategy.	CT.9 <ul style="list-style-type: none"> • Conduct an audit of current interpretive signage on site and identify any gaps. 	Interpretive signage implemented in accordance with adopted Interpretation Strategy.	CES/ Museum/ FSHS	Staff/ Volunteer time	Medium	
		CT.10 <ul style="list-style-type: none"> • Update the interpretative signage plan as a component of the Interpretation Plan Strategy (as required) and prioritise actions in the Capital Works Program. 					

Topic	Strategy	Means of Achievement (Management actions)	Means of assessment	Lead responsibility	Potential funding source	Priority	HMP policy	
Tours	Provide high quality tour products	CT.11	Review and update as necessary the Fort Scratchley Historic Site Tour Guide Policy 2008.	Tours of the site are conducted in accordance with relevant policies.	CES/ Museum/ FSHS	Staff/ Volunteer time	Low	
		CT.12	The content of tours – guided, self guided or other should be consistent with the policies and procedures of the Tour Guide Policy.		FSHS/ CES	Staff/ Volunteer time	Ongoing	
	Investigate the potential for providing additional opportunities to engage with the site.	CT.13	Consider the development of self-guided tours to compliment guided tours offered on site.	Implementation of self-guided tours.	FSHS/ CES/ Museum	Operating revenue	Low	
Education	Develop partnerships with educational institutions including Newcastle University and Hunter schools.	CT.14	Continue to build on school excursions linked to the new National Curriculum requirements.	A strong educational program in place.	FSHS/ CES/ Museum	Staff/ Volunteer time	High	

Infrastructure

7.3.5 Infrastructure

Management principles

- To retain and conserve all buildings, structures and landscape elements in the inner Fort precinct.
- To manage the grounds of the site as an integral part of the place. The bare open nature of the setting should be maintained although some former elements may be introduced for interpretive or operational reasons. New elements should only be introduced where essential for the site's operation.
- To maintain and where possible enhance significant views to and from the site.
- To retain the inner Fort precinct in its present configuration. Buildings, structures and spaces of greatest significance and interest should be made available for interpretation of the significance of the place.

Management objectives

8. Suitably manage and conserve the natural and cultural significance of the Fort's landscape and setting.
9. Provide for passive recreational activities that complement the Fort's cultural heritage and natural setting.

Alignment with Community Strategic Plan strategies

- Create welcoming and accessible community facilities and attractive public spaces that create opportunities for people to meet and connect with one another.
- Ensure the protection and enhancement of well located and connected open space and access to the foreshore, harbour and waterways for the use and enjoyment of everyone.

Topic	Strategy	Means of Achievement (Management actions)	Means of assessment	Lead responsibility	Potential funding source	Priority	HMP policy	
Landscape	Ensure that landscaping works are undertaken in accordance to an identified plan and level of service that consider potential archaeological and environmental values of the site.	1.1	<ul style="list-style-type: none"> Develop and implement a Landscape Masterplan to appropriately plan for and manage the cultural landscape elements of the site. 	Landscape Masterplan developed and implemented.	IMS/CES/SPS	Staff time	Medium	7.1 8.1 – 8.8
		1.2	Ensure plantings are consistent with the Heritage Management Plan and in particular do not impact on identified view corridors.		CES	Staff time	Ongoing	
		1.3	Undertake site inductions for all contractors or volunteers undertaking landscaping work on site. Inductions will outline the sensitivities of the physical environment in terms of identified and potential archaeological and environmental elements.	Induction and associated procedures in place.	CES	Staff time	High	
		1.4	Establish a Service Level Agreement for landscaping works on site	All landscaping works undertaken in accordance with a Service Level Agreement.	CES/PRS	Staff time	Medium	
	Undertake weed management and address soil erosion.	1.5	Undertake weed management in accordance with the Coast and Estuary Vegetation Management Plan.	Weed management compliant with relevant environmental plans and policies.	CES	Partner-ship Corrective Services	High	8.7
Signage	Ensure a coordinated system of signage is installed to provide clear direction within and to the site.	1.6	Conduct an audit of directional signage within and adjacent to the site.	Way finding strategy implemented.	CES/TEDS	Staff time	Low	
		1.7	Develop and implement a way finding strategy. Consider recommendations and potential synergies with The Foreshore Plan of management, Coastal Management Plan or other relevant plans covering the area adjacent to the Fort.		CES/TEDS/PRS	Operating revenue	Low	
Furniture	Upgrade visitor infrastructure and services in response to visitor expectations and consistent with the heritage values of the site.	1.8	Develop design guidelines to provide guidance on the consistent design (materials and style) and ongoing maintenance and repair of site furniture.	Continued use of the site for passive recreation and high visitor satisfaction.	IMS	Staff time	Low	
		1.9	Replace the current Council waste bins with something more fitting of the aesthetic and heritage values of the site.		IMS/ CES	Operating revenue		
		1.10	Enhance passive recreation opportunities through the progressive upgrade of existing and installation of additional park furniture as required.		CES/ PRS	Operating revenue	Ongoing	
		1.11	Retain the existing playground (at the Fort entrance) as a local standard playground – subject to any recommendations in Council strategies.		PRS	Operating revenue	Ongoing	

Topic	Strategy	Means of Achievement (Management actions)	Means of assessment	Lead responsibility	Potential funding source	Priority	HMP policy	
Security	Address on-site security.	1.12	Encourage neighbours to notify Council of any concerns regarding vandalism.	Reduced incidences of vandalism.	CES	Staff time	Ongoing	
		1.13	Review current security and surveillance measures. Investigate all options to improve site security.		CES	Operating budget	Medium	
Parking	Parking provided on the site that meets the needs of visitors and is in accordance with the policies in the Heritage Management Plan.	1.14	Ensure that the provision of parking is undertaken in accordance with the Heritage Management Plan.	Suitable parking provided to support usage of the site and in accordance with the policies in the Heritage Management Plan.	CES	Staff time	Ongoing	9.1 – 9.5
		1.15	Manage overflow parking on the grassed area along Nobbys Road.	Parking area utilised only by those visiting the Fort.	CES	Staff time	Ongoing	
Building and development	Any building and development will be undertaken in accordance with legislation and policies.	1.17	New development or activity at the site will only be permitted in accordance with the Heritage Management Plan and approval of NSW Heritage authorities.	New development or activity only undertaken in accordance with relevant legislation and policies.	SPS	Staff time	Ongoing	4.1 - 5.2, 6.1 - 6.12

Visitor Experience

7.3.6 Visitor experience

Management principles

- To have primary regard for physical conservation and interpretation. The site should become financially self supporting, however, it should not be required to yield a return on funds invested.

Management objectives

- Promote the site in a manner that enhances public appreciation of the site's heritage values, while enhancing the quality of the visitor experience and maximising economic returns from visitors.
- Provide unique experiences and opportunities to encourage broad and repeat visitation.

Alignment with Community Strategic Plan strategies

- Provide events to encourage use of open space and facilities and participation in activities such as 'come and try days' and 'active parks programs'
- Provide and support opportunities for participation in a variety of cultural events and activities by people of different age groups and life stages that enhance community wellbeing and inclusion
- Recognise and support creative endeavours that enrich the diverse cultural life of the community
- Develop cultural activity clusters to assist in reviving the City centre

Topic	Strategy	Means of Achievement (Management actions)	Means of assessment	Lead responsibility	Potential funding source	Priority	HMP policy	
Marketing and promotion	Promote and market Fort Scratchley as a key destination in Newcastle.	VE.1	Develop a brand and marketing plan to raise the profile of the Fort as a key cultural, tourism and events venue. Ensure that the marketing plan is interrelated and derived from the appropriate presentation of heritage values of the site.	Increased awareness and visitation (including repeat visitation)	CES/TEDS	Staff time	Medium	
		VE.2	Review and update marketing strategies in response to customer feedback and changing visitor profiles.	Branding and marketing facilitates visitation and interest in Fort Scratchley.	CES/TEDS	Staff time	Ongoing	
		VE.3	Work with the broader heritage and tourism sector to identify joint tourism, marketing and promotion e.g. The Coal River Working Party, The National Trust of Australia (NSW), Newcastle Museum and Newcastle Art Gallery.	Joint marketing initiatives undertaken.	CES/TEDS	Partnerships	Ongoing	
Product	Review product development.	VE.4	Ensure that all selected products contribute towards an accurate representation of the heritage values of the sites and do not detract from or contradict messages conveyed by any other interpretation, education on the site.	Products associated with the Fort support the values of the site.	CES/FSHS/Museum	Staff time	Ongoing	2.3
		VE.5	Undertake visitor surveys and market research to better understand current satisfaction levels and expectations as the basis for product development.	Product development is guided by visitor expectation.	CES/FSHS	Staff/Volunteer time	Ongoing	19.1 - 19.5
		VE.6	Explore a range of tourism products and pricing structures to enhance the visitor options and financial returns.		CES/TEDS	Staff time	Medium	
Product	Explore opportunities to enrich the visitor experience.	VE.7	Investigate the potential of linking venue hire of the Multipurpose Centre with activities in the inner fort.	Positive visitor experience received.	CES/FSHS	Staff/Volunteer time	Low	
		VE.8	Explore opportunities to enrich the visitor experience through experiential events e.g. audio simulation, themed dinners.		CES/TEDS/FSHS	Staff/Volunteer time/ Partner-ship	Low	
	Review current merchandise products.	VE.9	Consider opportunities to work with the Museum to review retail operations.	Improved merchandise products	FSHS Supported Museum	Staff/Volunteer time/	Low	
	Review current food and beverage opportunities on site.	VE.10	Look at the feasibility of reintroducing food and beverage options on site and undertake an EOI process to source a suitable service provider.	Successful operation of food and beverage outlet.	CES	Staff time	Medium	

Topic	Strategy	Means of Achievement (Management actions)	Means of assessment	Lead responsibility	Potential funding source	Priority	HMP policy	
Website	Consolidate and improve the Fort Scratchley website.	VE.11	Undertake an analysis of the existing Fort Scratchley websites and plan amendments as required.	One website providing relevant information to the community for Fort Scratchley.	CES/FSHS	Staff/Volunteer time	Medium	
		VE.12	Combine the Council and Fort Scratchley Historical Society's website for Fort Scratchley to provide a single source of information.		CES/FSHS	Staff/Volunteer time	Medium	
	Provide opportunities for online booking.	VE.13	Investigate on-line distribution and bookings through the Fort Scratchley website, third party website and on-line distributors.	Online booking option available.	CES	Operating revenue/ Partner-ship	Low	
Package	Explore opportunities for packaging the Fort Scratchley product with other compatible products and services.	VE.14	Investigate package tours with other heritage experiences e.g. ghost tours, museum, Nobbys, walking tours.	The Fort Scratchley product is offered as a package with similar products and services.	CES/TEDS	Staff time	Low	
		VE.15	Explore the concept of "Ticketing for multiple Newcastle cultural sites".		CES	Staff time	Low	
		VE.16	Look at the potential of incorporating Fort Scratchley School Curriculum Tours with Civic Theatre, Newcastle Museum and Maritime Museum.		CES	Staff time	Low	
Community Use	Provide further opportunities for the community to access the site and utilise the facilities.	VE.17	Review the pricing structure for the hire of the Multipurpose Centre for use by community groups.	Pricing structure provides opportunities for broader community access where possible.	CES	Staff time	Medium	
Events and activities	Interpret the heritage values of the site using an appropriate series of events and activities.	VE.18	Develop an Events program appropriate for the site, based on consideration of potential benefits and impacts on heritage values.	Events provided/ managed in accordance with an Events Policy for Fort Scratchley.	TEDS/CES	Staff time	High	2.4
	Provide and/or facilitate a range of community events and activities throughout the year.	VE.19	Work with a range of local and regional organisations and groups to develop a program of activities as one off or regular events in the calendar e.g. theatre companies.	Annual events calendar in place.	CES/TEDS	Partnerships	High	
		VE.20	Explore the introduction of evening theme shows linked to key dates.		CES/TEDS	Partner-ship	Medium	
	Investigate opportunities to encourage repeat visitation of the site.	VE.21	Explore the potential for regular changing of exhibitions and special events.	Increased level of repeat visitation.	CES/TEDS/FSHS	Staff/Volunteer time/ Partnerships	Low	
Public safety and risk management	Ensure policies and procedures are in place in relation to Visitor and Occupational Health and Safety and emergency response.	VE.22	Maintain a risk management system that provides for regular identification, inspection, reporting and mitigation of existing and potential risks to public or staff safety.	Relevant visitor and occupational health and safety policies and procedures in place.	CES	Staff time	Ongoing	
Monitoring and review	Research, monitor and evaluate visitor experience on a regular basis to better understand visitor profiles.	VE.24	Monitor customer satisfaction and undertake regular visitor surveys and market research to gain feedback relating to visitor trends and needs. Use the information to improve the quality of the visitor experience.	Ongoing monitoring of customer satisfaction in place.	CES/FSHS	Staff/Volunteer time	Ongoing	

8.0 Implementation and Review

8.1 Resourcing and Implementation

The implementation of this Plan requires Council to undertake an annual review of each action. Actions within a plan of management must be evaluated against other Council priorities, the Council's capital works program and business planning for Council's various units. Final commitment to implementing an action is given once it appears in the Delivery Program and other relevant documents including Council's Strategic Asset Management Plan(s) and Long Term Financial Plan.

8.2 Review

Plans of management should be regularly maintained and reviewed. A comprehensive review of this Plan, in terms of the achievement of objectives and implementation actions, should be undertaken no later than four years after its adoption. A review of high and medium priority actions should be undertaken annually, to assess the priority within Fort Scratchley against other areas of Council.



Appendix A

Audit of Actions from the 2008 Fort Scratchley Plan of Management

Topic	Action	Status	Comments
Heritage Status	The site shall be recognised on the appropriate local, state and national registers to afford it the highest appropriate legislative protection.	Ongoing	The Coal River Precinct (includes Fort Scratchley) is listed under the NSW Heritage Act State Heritage Register. The Fort Scratchley Group (buildings and underground forts – Coal River Precinct) is listed in the Newcastle LEP 2012. The Coal River Working Party has a current application to include the Coal River Precinct on the National Heritage List.
Legislative Obligations	Management will comply with the requirements of legislation applicable to the site.	Ongoing	
Heritage Management Plan	All works undertaken on the site shall be in accordance with the principles of the Heritage Management Plan.	Not complete	A conservation works program or a specific Business Plan has not been developed for the site.
	Further conservation initiatives recommended by the Heritage Management Plan to enhance heritage significance and value of the site shall be undertaken through a works program developed through the Business Plan. The program will be implemented when resources are made available.	Partial	Manager – Major Venues (including Fort Scratchley) appointed. Responsible for convening the Fort Scratchley Operational Committee. An Advisory Committee has not been convened or Business Plan developed.
Volunteers	The continued participation of the Fort Scratchley Historical Society (FSHS) is to be encouraged, supported and formalised through a Memorandum of Understanding.	Not complete	Discussions have commenced with regards development of a formal agreement between Council and the FSHS. This will take the form of a lease/operating agreement.
	The FSHS shall be the peak coordinating group for volunteer contributions to the operation and management of the site. The Society shall be encouraged to keep records of all volunteer activities.	Ongoing	FSHS operate the site 6 days a week, 10am to 4pm. FSHS maintains listing of membership/ volunteers.
	A policy, protocol and guidelines shall be established for the operation of volunteers on the site.	Partial	Documents have been produced by International Conservation Services (ICS) 2008 - guidelines for volunteer operations in relation to museum and guided tours at the site.
	The contribution of volunteers shall be recognised publicly and the expansion of their efforts actively assisted and encouraged.	Ongoing	<ul style="list-style-type: none"> Recognition of volunteers through appreciation certificates Dec 2009 Recognition of volunteers through National Volunteer Week May 2010 Recognition of volunteers at 2010 Australia Day Luncheon

Topic	Action	Status	Comments
Consultants and academics	Establish a database of consultants with expertise in the specialist fields required for the conservation of the Fort.	Not complete	
	Assess all proposed conservation projects to ensure adequate expert advice has been obtained before the execution of any works.	Ongoing	Advice sought from Council's Heritage Officer prior to the execution of any works.
	Seek grants to support targeted research either as targeted projects or in conjunction with organisations with an interest in the Fort.	Not complete	
	Enter into agreements with academic groups for the involvement of undergraduate and postgraduate works. In particular set up a high level liaison with the University of Newcastle to ensure opportunities are recognised and to provide a conduit to other tertiary institutions.	Partial	During refurbishment of the site a relationship was established with the University of Newcastle. Fort Scratchley Historic Site - A Living History web site was created by the Lecturer in Communication.
	Provide public recognition of the contribution of donated consultant time and academic cooperation and achievement.	Ongoing	
Training	A training plan and associated material developed for induction of tradespeople, OH&S for all volunteers and tradespeople, public relations & safety and interpreting the story of Fort Scratchley consistently and accurately	Ongoing	A training plan and associated material developed for induction of tradespeople, OH&S for all volunteers and tradespeople, public relations & safety and interpreting the story of Fort Scratchley consistently and accurately Ongoing
	Research material shall be made available for the use of personnel to further their understanding of conservation, the history and significance of the site.	Ongoing	Research material, plans and documents are available from Commercial Enterprise Services, on dataworks and from the FSHS. This material is readily available for everyone with a vested interest in the Fort.
	Committed personnel contributing significantly to the site's conservation and promotion shall be encouraged and supported where appropriate through development and training.	Ongoing	Venue hire & booking staff, commissionaires, trades people, volunteers and a range of other personnel have been and are currently being encouraged and supported through development and training.
Asset Inventory and management	Establish an asset inventory and management database of objects and documents associated with the site.	Not complete	Information regarding the condition of most built assets is maintained by Council. The FSHS manages a document library and artefact catalogue on site. Further work required to ensure all assets are listed in the database.
Funding and financial management	The Business Plan shall give high priority to the establishment of a self-sufficient financial framework. Operations shall be limited to available resources, to ensure the site is at least maintained in its condition at time of transfer from the Australian Government.	Partial	A specific Business Plan for Fort Scratchley has not been developed. A Major Venues Business and Marketing Plan 2012/2013 has been developed. Operations are limited to available resources.
	The financial framework shall incorporate transparent and accountable reporting.	Ongoing	Financial framework is in accordance with the Local Government Act 1993.

Topic	Action	Status	Comments
Historical and cultural research	Provide for the adequate storage of historical and research material on site in a manner to ensure its long-term conservation.	Not complete	There is currently a lack of adequate storage on site.
	Take action to bring various collections of material to the site with recorded acknowledgement of their source. An inventory and catalogue system shall be implemented to assist the identification and retrieval of items in the collection.	Ongoing	The FSHS manages a document library and artefact catalogue on site.
	Ensure access to collection by all parties with legitimate needs.	Ongoing	
	Encourage and support research opportunities with local education institutions to assist further research. Actively seek opportunities for grants to undertake further research work. In particular take action with regard to collection of oral histories while the opportunities exist.	Ongoing	Oral and video research has been collected and a video has been produced by the University of Newcastle. The video is available for purchase at Fort Scratchley.
	Recognise and publicise the content and quality of the collection.	Ongoing	FSHS with the assistance of Newcastle Museum are in the process of creating a 5 room museum to exhibit and publicise the collection.
Site environmental management	The site shall be managed as part of the ecosystem management Council employs in the coastal areas of the city with respect to habitat, ecosystem and wildlife.	Not complete	No specific actions undertaken.
	Water and energy use monitored with the aim of reducing consumption.	Not complete	Monitoring not conducted given costs and priority in context of other actions.
	Waste management including recycling initiatives shall be integrated with Council's approach to waste collection and recycling to maintain the site in a clean and presentable state.	Complete	
Contractual Obligations	Establish protocols for communication and rectification work to be undertaken by the head contractor under the contract.	Complete	Actions undertaken at the time of transfer of the Fort from the Australian Government whilst defect liability obligations were with the head contractor of the conservation works.
	Document agreed understanding on responsibilities during the defects liability period to ensure action by Fort management does not compromise the head contractor's obligations. Incorporate such an understanding in induction training of personnel working on the site.	Complete	
	Ensure all warranties, where required, are initiated with suppliers and procedures are in place to exercise rights under the warranties.	Ongoing	
Routine maintenance	Establish schedules for daily, weekly, monthly and annual cleaning and grounds maintenance routines. Train volunteers, Council staff, lessees and contract staff in the standard and methods required as well as induction to the responsibilities of working on a heritage site.	Ongoing	Parks and Gardens Schedule maintenance program and Commissionaire cleaning schedule established.
	Ensure appropriate cleaning tools and materials are provided and supplies are always available.	Ongoing	Full list of MSDS completed for site chemical substances.
	Include grounds maintenance in the Councils parks and gardens maintenance program.	Complete	Grounds maintenance conducted as part of Parks and Gardens maintenance program and by Corrective Services.

Topic	Action	Status	Comments
Preventative maintenance	Establish a schedule of inspections to monitor the condition of the structures, artefacts and landscape on the site.	Ongoing	There are currently schedules for workplace inspections and asset inspections to monitor deterioration and degradation. Site inspections are also conducted regularly by volunteers and Council staff.
	Encourage through training a culture in volunteers and workers on the site to report observations where maintenance is required. Instigate a system to facilitate ease of reporting identified items of concern.	Ongoing	Reporting of maintenance items is an agenda item on the monthly Operational Management Committee meetings. Regular on-site inspections by Venue Services Coordinator.
	Establish schedules of routine maintenance including requirements identified in manuals of all plant and equipment installed on the site.	Ongoing	Air conditioning plant maintenance according to manuals. On site caterer and volunteers responsible for routine maintenance of their own items.
	Put in place contracts or agreements for the execution of routine maintenance. Establish a review process to monitor the effectiveness of the routine maintenance.	Not complete	
	Develop in the Business Plan, in conjunction with associated Council programs and initiatives, a regime of security measures and insurance to prevent the loss of heritage value on site.	Partial	Back to base security system in place, further improvement currently being costed.
Reactive maintenance	Instigate procedures and a culture of reporting required maintenance. Ensure procedures are in place to have rectification work undertaken promptly.	Ongoing	Reporting of maintenance items is an agenda item on the monthly Operational Management Committee meetings. Regular on-site inspections by Venue Services Coordinator.
	Investigate and where appropriate provide insurance cover.	Complete	Appropriate insurances are in place by Council as well as the FSHS.
Construction Works	Ensure procedures are in place to actively seek funding opportunities for further conservation work.	Ongoing	Both Council and the FSHS actively seek external funding sources.
	Develop a conservation works program within the framework of the Business Plan and in accordance with priorities set by the Heritage Management Plan.	Not Complete	A conservation works program has not been established.
Use	Open the site as a public museum during sustainable hours nominated in Business Plan.	Partial	Room 1 and 2 completed Sept 2010. 3 further rooms to be completed upon funding.
	Provide for flexibility of use within the site for both permanent and temporary uses, limiting the number and extent of places with a fixed use.	Ongoing	Places provided for temporary usage include the multi-purpose centre, barracks and tunnels. Places provided for fixed use include the Master Gunners Cottage and Workshop.
Leases and Licences	Develop policy through the Business Plan for appropriate leases and licences for uses and activities on the site consistent with the land categories and required to provide services and derive income for the operation management and self-sufficiency of the Fort.	Not complete	A framework for appropriate leases and licences consistent with land categories will be developed as part of this plan of management process.
Leases	Determine buildings and associated appropriate functions.	Not complete	Identified in Exhibition Strategy for Movable Heritage and the Heritage Management Plan. Further review required as part of this plan of management process.
	Undertake an objective and public procurement process.	Not complete	No leases currently in place for proposed areas.
	Formalise arrangements with long-term lessees.	Not complete	No leases currently in place for proposed areas
Licences- general			
Licence A: the provision of exclusive catering rights for the entire site. Exclusive access to the kitchen and café facilities within the multi-purpose centre.	Undertake an objective and public procurement process to determine the most suitable licensee.	Complete	
	Formalise arrangements for the licence	Complete	Site Catering contract in place. Formalisation of an arrangement with the FSHS is now required.

Licence B: the core purpose being the provision of administration and workshop areas for the FSHS.	Formalise arrangements for the licence with the FSHS in conjunction with the Memorandum of Understanding between the Council and the Society.	Not complete	To be undertaken in conjunction with this Plan of management process.
Licences- short term casual	Develop guidelines for acceptable activities, which may be permitted under a Short Term Casual Licence	Not complete	Further review required as part of this Plan of management process.
	Formalise the submission, assessment, approval process and conditions for Short Term Casual licence for activities on the site (Local Government (General) Regulation Act 1999, Section 24).	Not complete	All events and functions complete the Hiring Agreement specifying terms and conditions, details and costing.
	Prepare a pro-forma for short-term licence with associated conditions.	Complete	All events and functions complete the Hiring Agreement specifying terms and conditions, details and costing. May require review in light of any changes associated with this Plan of management process.
Fees	Determine a sustainable fee schedule in the Business Plan.	Ongoing	Fees & charges updated/ benchmarked annually.
Accessibility	Develop through the Business Plan a strategy for areas in Zone 2 (inner fort and interiors of structures in the outer area) to be made available to the public during the nominated hours.	Not complete	
Movement, circulation and safety of visitors	Monitor visitor movement patterns and provide additional control measures where safety concerns are evident.	Ongoing	
	Adapt circulation routes for the efficient and safe movement of people through the site.	Ongoing	Ongoing risk assessments undertaken for shared traffic/ pedestrian areas.
Vehicular access and car parking	Maintain provision for controlling vehicular access to the site including total exclusion. Maintain provision for controlling vehicular access on the site to designated roads and parking areas.	Ongoing	Bollard in place to prevent unauthorised vehicle access to inner Fort. On-site Commissionaires and risk assessments undertaken for shared traffic/ pedestrian areas.
	Provide for additional parking capacity on the site should temporary parking be required for special events in the precinct.	Complete	Designated bus zone and 2 overflow car parks established.
	Provide a parking regime that gives priority for visitors to the site.	Not complete	Overflow car parking in Zone 5 is not currently controlled.
Amenities	Monitor vehicle numbers and available parking. Adapt access and parking arrangements to changing requirements.	Not complete	
	Monitor visitor numbers to ensure they do not exceed the Building Code of Australia requirements for amenities.	Ongoing	Risk assessments undertaken for specific areas within Fort ensuring Building Codes are adhered to. DA for multi-purpose Centre restricts visitors to 150 in accordance with BCA.
Emergency and service vehicle access and procedures	For special events the provision of temporary toilet facilities adequate for the anticipated numbers are to be provided by the event organisers as a condition of the event proposal.	Not complete	
	Maintain an emergency access plan to ensure under all management regimes emergency services have unimpeded access when required.	Ongoing	Emergency Access Plan developed for the site.
	Control access of heavy service vehicles maintaining identified routes of documented load limitations.	Complete	Control identified in Risk Assessment for Fort Scratchley Vehicle Access.
	Establish an emergency evacuation procedure and the trial evacuation program. Liaise with emergency services and if deemed necessary carry out joint exercises to determine best procedures and familiarity of the site constraints should an emergency occur.	Ongoing	Emergency Plan in place for normal site operations. For community events, emergency evacuation procedures are communicated prior to the event to key personnel including outline of actions to be undertaken in the instance of an emergency.

Appendix B

Condition and use of existing built assets

Community access and recreation	Provide for passive recreation activities on the outer Fort site with open unrestricted access.	Ongoing	Passive recreation activities are provided for through the provision of open space and a playground. A proportion of this space is inhibited by the permanent operation of a car park.
Visitors and tourism	Determine carrying capacities for the various options of visitation to ensure a financial surplus is obtained following associated management and maintenance costs.	Not complete	Carrying capacities have not been determined. The significant heritage issues associated with this site are the major cost drivers. Financial surplus may not be feasible in the long term
	Welcome visitors.	Ongoing	Volunteers on site during opening hours
	Ensure safety and amenities appropriate for the number and type of visitors is maintained.	Ongoing	Additional amenities are brought in if required for larger functions and events.
	Monitor visitors with respect to visitation patterns with a view to improving the experience, encouraging return visits and increasing visitor numbers.	Partial	A monthly report is currently produced which includes visitation patterns. Further work required in terms of analysis of visitation patterns and development of strategies to increase visitor numbers.
	Formalise procedures for receiving and responding to visitor feedback.	Ongoing	An on-line survey is provided for completion post event and function. A visitors' book is also available for comment by guided tour patrons. All written correspondence is addressed according to standard Council procedure.
Education – presentation and interpretation	Provide for interpretation through the ongoing implementation of the Interpretation Plan for Fort Scratchley.	Ongoing	As funds allow.
	Develop stories and themes of interest to suit high-yield markets including business tourism segments.	Partial	
Marketing	Identify resources and responsibilities for the promotion and marketing on the site including press relations.	Ongoing	The site is advertised and showcased in publications and expos for events and functions.
	Define market target areas, visitor needs and expectations from existing information and develop marketing strategies for each.	Partial	Initial work undertaken as part of the Draft Major Venues Business and Marketing Plan 2012/13.
	Conduct research to validate target areas as a proportion of total visitation and to establish baseline data to plan ongoing marketing strategies.	Not Complete	
	Ensure Fort Scratchley is integrated into the range of promotion identified in the Coal River Conservation Management and Cultural Tourism Plan.	Complete	Fort Scratchley Historic Site Exhibition Strategy for Moveable Heritage (2008) and Heritage Interpretation Works Plan 2008 link to the Coal River Conservation Management and Cultural Tourism Plan.
	Ensure a coordinated system of signage is installed to provide clear direction to the site and from other related sites of significance.	Underway 2013	Council's Tourism and Economic Development Services are currently reviewing wayward signage for Newcastle East.
Marketing	Establish contacts with local media and develop a press release protocol to take advantage of opportunities for media coverage. Recognise volunteers in the media and promote recruitment for additional volunteers.	Ongoing	Event specific communications undertaken through Council's Communications Department. Various TV, radio and press release occur each year.
	Assist stakeholders and local business to develop revenue raising opportunities on the site.	Partial	Licence with catering company. Potential opportunities for further work in this area.
	Establish contacts with related sites in NSW (such as Sydney Heads) and interstate (such as Fort Queenscliff in Victoria) to share experiences and enable reciprocal information to be provided.	Partial	FSSH maintains contacts and site visits. Visits to these sites would also be beneficial to key staff.
	Develop an annual program by building on successful community events.	Ongoing	Annual program of events including but not limited to Labour Day, Australia Day, Anzac Day, Queens Birthday, Mattara Celebrations.

Condition Audit – (based on Council audit (2009))

10	An asset that has failed is no longer serviceable and should not remain in service. There would be an extreme risk in leaving the asset place in service.
9	An asset in extremely poor condition with severe serviceability problems and needing rehabilitation immediately. Could also be a risk to remain in service.
8	An asset in very poor overall condition with serviceability now being heavily impacted upon by the poor condition. Maintenance costs would be very high and the asset would be a point where it needed to be rehabilitated.
7	An asset in poor overall condition deterioration would be quite severe and would be starting to limit the serviceability of the asset. Maintenance costs would be high.
6	An asset in fair to poor overall condition. The condition deterioration would be quite obvious. Asset serviceability would now be affected and maintenance cost would be rising.
5	An asset in fair overall condition deterioration in condition would be obvious and there would be some serviceability loss.
4	An asset in good overall condition but with some obvious deterioration evident, serviceability would be impaired very slightly.
3	An asset in very good overall condition but with some early stages of deterioration evident, but the deterioration still minor in nature and causing no serviceability problems.
2	An asset in excellent overall condition. There would be only very slight condition decline but it would be obvious that the asset no longer in new condition.
1	A near new asset with no visible signs of deterioration often moved to condition 1 based upon the time since construction rather than observed condition decline.
0	A new asset or an asset recently rehabilitated back to new condition.

1	Exceptional	<ul style="list-style-type: none"> Item is demonstrably rare, outstanding and/or an irreplaceable example of its type A high degree of intact and original fabric that is readily interpreted Loss or alteration would substantively undermine the heritage values of the place overall
2	High	<ul style="list-style-type: none"> The item demonstrates a rare example of its type It is largely intact and interpretable Loss or unsympathetic may diminish the heritage values of the item and place overall
3	Moderate	<ul style="list-style-type: none"> The item may have altered or modified elements Item is intact enough to be partially interpretable as a single item or as part of the site in its entirety Loss or unsympathetic alteration is likely to diminish the heritage values of the item and potentially the place if inappropriately managed
4	Low	<ul style="list-style-type: none"> The item may be largely altered Does not demonstrated the key defining qualities of the heritage values, but may be contributory Alteration and/ or modification may make it difficult to interpret the item depending on the existing integrity of the item Loss may not diminish the heritage values of the place overall
5	None	<ul style="list-style-type: none"> Item does not reflect or demonstrate any National Heritage values

Inner Fort Precinct

Building No./ Asset No.	Item	Room ref	Description	Heritage significance	Condition	Usage	Photos
The battery complex				Exceptional			
11 (BU000771)	Western Barbette		Mark VII guns and pedestals	1	3	Gun currently being reinstalled	
13 (BU000688)	No. 1 Gun			1	5	Guided tours Ceremonial firing	
14 (BU000687)	No. 2 Gun			1	4	Guided tours Ceremonial firing	
16 (BU000773)	Tunnels		Network of corridors and chambers connecting the magazine, gun emplacements and the casement.	1	3	Guided tours	
15 (BU000772)	Artillery Store			1	4	Gift shop	
12 (BU000686)	Battery Observation Post			1	4	Command Post for firing the guns. Upstairs is the only operational room, accessed from the outside of the building. Ground floor is used to store oils and cleaning equipment.	

Building No./ Asset No.	Item	Room ref	Description	Heritage significance	Condition	Usage	Photos
	The Parade Ground			3		Guided tours, site interpretation, public events and limited private events and functions.	
	Flagstaff		Conjectural reconstruction of the original.	3			
Buildings							
6 (BU000683)	Canteen *	A	Recreation Room	1	3	Utilised by on-site caterers (licenced space)	
		B	Canteen			Utilised by on-site caterers (licenced space)	
		C	NCO Room 1			Storage	
		D	Gunners Room			Storage	
7 (BU000682)	Barracks	A	Barracks North	1	3	Functions	
		B	Barracks South			Functions	
8 (BU000684)	NCO's Quarters**	A	NCO Room 3	1	3	Library (military publications)	
		B	NCO Room 4			Library (military publications)	
		C	Barracks Office			Library (military publications)	
		D	Store			Archives	
		E	Wash house			Archives	
		F	Kitchen			Storage of uniforms	
		G	Pantry			Storage	
		H	Store			Storage	
9 (BU000685)	Com-mandant's Cottage	A	Bedroom 1	1	3	Military Museum (1914-1939)	
		B	Officers Sitting Room			Military Museum (1939-1945)	
		C	Bedroom 2			Military Museum (in progress)	
		D	Bedroom 3			Empty	

Building No./ Asset No.	Item	Room ref	Description	Heritage significance	Condition	Usage	Photos
10 (BU000814 and BU000815)	Servants Quarters	A	Servants bedroom,	2	3	Military Museum (1882-1913)	
		B	Kitchen			Military Museum (1797-1881)	
		C	Wash House			Interpretation	
		D	Servants Closet			No public access (shower toilet)	
2 (BU000692)	New Guardhouse		Main room and two cells	2	4	Presentations to the public (DVD)	
5 (BU000681)	Old Guard House	A	Ablutions (modern)	1	4	Public toilets	
		B	Bathroom			Storage	
		C	Store			Storage	
		D	Large main switchboard and meters.			Electrical and communication distribution equipment	
		E	Guard Room			Currently being renovated as office space to be used in association with the museum.	
20 (BU000696)	NCO's Ablutions Block	A	Gunners' bathroom	2	3	Storage	
		B	Lavatories			Artefacts associated with the museum and yet to be categorised	
		C	NCO's bathroom				
19 BU000690)	Gunners' Ablutions		Two lavatories and a urinal on its southern side.	1	4	Storage No public access	
3 (BU000691)	The Laboratory		Reinforced concrete building with flat roof.	1	4	Storage No public access	
4 (BU000689)	Searchlight Generator Room			2	4	Storage No public access	

Building No./ Asset No.	Item	Room ref	Description	Heritage significance	Condition	Usage	Photos
17 (BU000693)	Mine Firing Station		Two rooms Partially buried		4	Interpretation Currently closed to public due to vandalism.	
18 (BU000774)	World War II Searchlight Directing Station			3	4	Empty	
	Inner Fortress Wall		Approximately 150 feet along the southern edges of the fortress.		1		
	Entry Gates			2			
	Bridge			3			
	Dry Ditch and wall			1			

* Referred to in Heritage Management Plan as Recreation Room and Canteen Block

** Referred to as the Kitchen Block in the Heritage Management Plan

Appendix C

Facilities permissible at Fort Scratchley

Facilities that may be approved on Community Land

Detailed policies regarding permissible development are provided in the Heritage Management Plan (p166-169) and should be referred to before planning any new development or adaptive use.

In general terms, all buildings, structures and landscape elements in the inner fort precinct should be retained and conserved, and no new development will be permitted in this area. New development will be permitted within certain areas of the outer fort precinct as indicated in the following table. Any new developments or adaptive re-use will be carried out strictly in accordance with the Heritage Management Plan.

Requirements for consent

Under section 60 of the Heritage Act 1977, approval must be sought from the Heritage Council to carry out works to a heritage item listed in the State Heritage Register. Standard exemptions from the requirements of Section 60 apply to the following work categories:

- Maintenance and cleaning (continuing process of protective care)

- Repairs
- Painting of previously painted fabric
- Excavation, under certain conditions, except in cases of archaeological significance
- Restoration – returning the fabric to a known earlier location
- Development in accordance with a heritage (conservation) management plan endorsed by the Director-General
- Minor activities with no adverse impact on heritage significance (as determined by the Director-General)
- Work affecting non-significant fabric
- Removable temporary public events
- Removable temporary works required in response to an emergency involving risk or injury and/or risk to property

The Heritage Management Plan delineates the Fort Scratchley site into five zones of permissible development (refer to figure 5). The table below outlines permissible development/facilities within each of the five zones.

Permissible development

Zone Precinct	Description	Facilities/ Development	Notes
Outer Fort Precinct Zone 1	Open area forming the western side of the entry driveway entrance to the site.	Clear open space, no built development. No new permanent structures.	Development or structures of any kind are not permitted (the existing playground may be retained in its present form, consistent with the simple utilitarian nature of the site).
Inner Fort Precinct Zone 2	Encompasses the Inner Fort and is the most important zone in terms of significant and original structures.	Intervention affecting original fabric i.e.: <ul style="list-style-type: none"> • removal of or alteration to original fabric • alteration to exterior • extension of buildings • infill development 	Not permitted except where unavoidable for essential services or provision of safety infrastructure.
		Limited and strictly controlled alteration to interior fabric and internal spaces.	Permitted only with approval of Site Manager, after seeking comment from Council's Heritage Officer and only as essential for interpretation of the spaces.
		New pathways and ramps.	Minimised and permissible only in areas where precedence for pathways and paved areas existed previously e.g. parade ground and barbettes structure.
		Handrails	Minimised and permissible only where absolutely essential for safety and accessibility.
Outer Fort Precinct Zone 3	Encompasses main driveway entrance and the Master Gunner's cottage.	Limited redevelopment potential	Exception of passive recreation and essential services such as parking.
		Gates and fencing	Design and detailing based on traditionally detailed perimeter fencing elsewhere on site and small in scale to minimise impact on views and vistas.
Outer Fort Precinct Zone 4	Encompasses Multi-purpose Centre and Workshop	Modifications only, outside view corridor	Modification or low key infill development affecting the new structures only (Multi-purpose Centre and Workshop). Undeveloped curtilage to Masters Gunner's cottage, on to the dry ditch extents and to the views of the fort walls will remain unaffected by new development.
Zone 5	Open area fronting Nobby's Road.	Potential redevelopment site	Western precinct may be redeveloped with new structures of maximum two storey height.

Information in table above has been adapted from the Heritage Management Plan 2008 (P.165 – 169)

Appendix D

Community consultation facilities that may be approved on community land

The following is a summary of the consultation undertaken in the development of this Plan of management.

1. Stakeholder workshops (April and May 2012)
2. Council Project Control Group workshop (June 2013)
3. Community workshop (July 2013)

Industry workshop (July 2013)

1. Stakeholder workshops

During April and May 2012, Council engaged an external facilitator to conduct two workshops with the key stakeholders of Fort Scratchley (Council and the Fort Scratchley Historical Society) with a view to developing a strategic plan for the Fort.

A previous audit of Council's non-statutory services included a recommendation that future management structures at Fort Scratchley are reviewed to improve revenue streams and commercial opportunities to enable future maintenance requirements to be met. Council adopted these recommendations on 17 April 2012.

The workshops were an opportunity for the key stakeholders to consider the current management model and future direction for the Fort.

Summary of outcomes

Vision

Fort Scratchley is a nationally significant, unique cultural and community experience reflecting an operating fort.

Council's Corporate Values

Cooperation – through mutually beneficial partnership between key stakeholders
 Respect – for the historic significance of the site
 Excellence – through ensuring the Fort is an authentic experience while meeting professional standards
 Wellbeing – through a shared community experience

Mission Statement

To recognise the Fort as integral to Newcastle's history and establish the Fort as a multi-use facility and leading destination for visitors.

Strategic priorities:

- Strengthening the vision and governance
- Develop and foster relationships
- Improved resource management
- Support collection management
- Grow marketing opportunities
- Enhance site management

Opportunities

	Opportunities
Strengthening the Vision and Governance	<ul style="list-style-type: none"> • Develop a Strategic Vision and Plan for the Fort • Formalise and sign an appropriate partnership agreement between the City of Newcastle and the FSHS • Develop a Business Plan linked to the Strategic Plan • Review Council organisational decisions regarding significant WHS matters including the issuing of various licences by relevant authorities (e.g. gun licensing laws in relation to volunteers and integral to tourism) • Determine where the Fort strategic matters are located within the Council Strategic Committees structure so that clear accountabilities and responsibilities are established, deliverables set and monitoring and reporting frameworks are in place. • Establish the Advisory Committee as per the PoM which will set the strategic direction for the Fort • Review the PoM in 2013 to reflect changed business arrangements • Consider the implementation of a Fort Scratchley Trust or other appropriate mechanism to deliver long term financial sustainability through donors and sponsorships • Explore the development of relationships/partnerships to supplement financial arrangements.
Develop and foster relationships	<ul style="list-style-type: none"> • Implement mechanisms for dispute resolution between Council and stakeholders • Clarify the role of Council officers and the FSHS members and develop systems and processes to acknowledge these roles particularly in relation to the approval of site commercial activities, impact, interpretation and promotion • Alleviate the pressure on the volunteer group by reviewing opening hours (16 guides across six days) • Consider the best way to manage the historical site and associated exhibits. Possibility of curatorial expertise provided by the Museum who also have experience in management of volunteer workforce • Develop more effective communication strategies • Determine where within Council structure is the most appropriate location for management accountability of the Fort
Improved Resource Management	<ul style="list-style-type: none"> • Explore the onsite resource requirements (currently estimated at 1.5 EFT) • Review and improve revenue streams and commercial opportunities to enable ongoing building maintenance and repair • Consider the introduction of traineeships working across the cultural precincts
Support Collection Management	<ul style="list-style-type: none"> • Review the suite of policies and procedures relevant to the collection such as the Collection Policy and Plan, Exhibition Policy and Plan, Education Policy and Plan to ensure that they are fit for purpose • Improve storage conditions and overall management of the collection (coastal environment) • Improve standard and display of collection • More visible access to collection • Improve interpretation utilising more contemporary museum practices
Grow marketing opportunities	<ul style="list-style-type: none"> • Align the City of Newcastle marketing with the Fort Scratchley product • Develop formal strategic alliances with Newcastle Museum, the Maritime Museum and the Australian War Memorial • Product development which tells the story of 'Newcastle Starts Here' • Improved merchandise products. Consider opportunities to work with the Museum to review retail operations • Review the current advertising and promotion of the Fort in line with other Council promotions for Blackbutt, Nobbys etc
Enhance site management	<ul style="list-style-type: none"> • Create a physically more welcoming presence with directional signage. Arrival needs to be less confusing (Multipurpose Centre and Fort) • Explore the concept of "Ticketing for multiple Newcastle cultural sites" • Review pricing policy and structure • Alternate tour presentations to be considered including iphone application, MP3, audio self guided tours, use of younger guides • Enhanced disabled access • Inclusion in the Green bus circuit • Explore the possibility of opening at night for "Son et Lumiere" presentations • Develop partnerships with educational institutions including University of Newcastle, Hunter Schools • Explore the introduction of evening theme shows linked to key dates • Introduction of Multipurpose Centre flexible utilisation hours

2. Council Project Control Group workshop

A workshop was held with the project control group (PCG) for the Fort Scratchley Historic Site Plan of management review project (Council and Fort Scratchley Historical Society). The objective of the workshop was to gain a shared understanding of the opportunities, issues and roles of the key partners at Fort Scratchley.

Summary of outcomes

Vision

The shared vision for Fort Scratchley put forward by the participants:

Fort Scratchley is a nationally significant, unique cultural experience reflecting an operating fort.

Values

Participants confirmed the values for Fort Scratchley, taken from the Heritage Management Plan (2008) and added the following:

Historic

- The need to highlight the significance of firing the gun during World War II. Fort Scratchley being the only land based guns engaged to enemy surface target in Australia.

Aesthetic

- The geographic setting i.e. the view over the city and line of sight to other military sites e.g. Shepherds Hill and Fort Wallace.

Creative/ technical

- Working guns

Social

- The important partnership with the Fort Scratchley Historical Society, most notably their experience and engagement of visitors of the site.
- Despite being a military installation the site has an atmosphere of serenity and feeling of openness. The site celebrates history, not war.

Opportunities

A full list of the opportunities for Fort Scratchley identified by participants is provided in the following table and grouped into common themes. In the final workshop exercise, participants identified which of the opportunities they believed were most important by "voting" with coloured dots. The total number of dots tallied for each opportunity and theme appears in brackets.

The highest priorities in terms of general theme were associated with 'historical' opportunities (16 votes), followed by product and promotion (13 votes).

Fort Scratchley is a nationally significant, unique cultural experience reflecting an operating fort.

Opportunities for Fort Scratchley

Theme	Opportunities
Operational (10)	<ul style="list-style-type: none"> City of Newcastle staff member support (4 votes) Full-time staff (6 votes) More grants secured Appearance of grounds Installation of fixed outdoor binoculars (pay view) Places to sit outside – trees, pots Better signage and digital interpretation Café – sit and enjoy the view and reflect on experience
Historical (museum/interpretation) (16)	<ul style="list-style-type: none"> Disappearing gun Restore disappearing gun Finish World War II Gallery (seven votes) World War II Room Finish the museum Develop museum Complete room five and six Every gun installed to fire (one votes) 9-inch gun from Sydney (three votes) Joint education opportunity with Newcastle Museum, Maritime Centre and MP (two votes) Visitor research and feedback on their experience (two votes) Collection management complete All uniforms reproduced (one vote) Develop interpretive signage in tunnels Visitor takes away a sense of what Newcastle is about Improve library
Product and promotion (13)	<ul style="list-style-type: none"> Promotion Publicity (one vote) Aggressive marketing (one vote) Special packages Packageable tours and other experiences marketed to tourism and travel profession (one vote) Package tours (two votes) Links to other key cultural sites eg. Museum etc. One o'clock gun/time ball (one vote) Digital tours and facilities Accommodation for weekend getaways Evening community events e.g. moonlight cinema (two votes) More live concerts/ performances (two votes) Regular events – evenings, weekends to package Tai Chi at the Fort Whales and coffee Café, visitor orientation, shop at entry (three votes) Sleep overs Weddings

Achieving Opportunities for Fort Scratchley

The opportunity given highest priority was related to staffing for the site (10 votes), indicated on the cards as 'full-time staff' (6 votes) and City of Newcastle staff member support (four votes). The second highest priority was to 'finish the World War II gallery' (seven votes).

Future opportunities under each of the three themes were further discussed in small groups in terms of how they might be achieved, the potential challenges and barriers and who could be involved in making them happen. These discussions are reflected in the table below.

Operational

Opportunity	How might this opportunity be achieved? Getting started; Key steps	Are there potential challenges or barriers to making this happen?	Who could be involved in making this happen? Partnerships; Roles
Staffing	<ol style="list-style-type: none"> An additional 1 EFT for marketing and product development of major venues (City of Newcastle). Major Venues currently recruiting 1 new EFT – Customer Experience Coordinator (develop commercial opportunities – more food and beverage product related) 	<ul style="list-style-type: none"> Additional EFT currently approved in the 2013/14 financial year. Waiting for organisational review to be completed. No appropriate candidate. 	<ul style="list-style-type: none"> EFT transfer from Tourism and Economic Development.
More grants secured	<ol style="list-style-type: none"> Develop kits to action at short notice. Refer to Interpretative Strategy and identify priorities. Have business cases developed in advance – aligned with the Plan of management and Heritage Management Plan. 	<ul style="list-style-type: none"> Insufficient resourcing 	<ul style="list-style-type: none"> Partnership between Fort Scratchley Historical Society and the City of Newcastle. Is there a speciality within Council that can assist with grant applications?
Appearance of grounds	<ol style="list-style-type: none"> Further engagement with organisations i.e. Correctional Services Binoculars - develop financial analysis. Identify suitable product 	<ul style="list-style-type: none"> Parks and Recreation reluctance to deliver above the basics. Supervision of Corrective Services – Fort Scratchley Historical Society members not have the man-power and reluctance to do so. 	<ul style="list-style-type: none"> Continual open dialogue between The City of Newcastle and Fort Scratchley Historical Society. Corrective Services Pre-employment training.

Historical

Opportunity	How might this opportunity be achieved? Getting started; Key steps	Are there potential challenges or barriers to making this happen?	Who could be involved in making this happen? Partnerships; Roles
Museum - World War II Room	<ol style="list-style-type: none"> Write the story Polish the story Engage consultant (qualified collection/display specialists are highly expensive) Price Installation 	<ul style="list-style-type: none"> Understanding grant criteria Cost of the consultant Volunteer time 	<ul style="list-style-type: none"> Volunteers Creative consultant Newcastle Museum and Singleton Army – listening and learning from their experiences in building exhibition space.
Disappearing gun	<ol style="list-style-type: none"> Source funding Reverse Engineer Construction 	<ul style="list-style-type: none"> Funding Engineering know-how Volunteer time for tracking the specifications and then putting the gun together 	<ul style="list-style-type: none"> Specialised members Council assistance with funding
Collection management complete	<ol style="list-style-type: none"> Recording of all artifacts Assessing significance Use of non-significant collection for other purposes. 	<ul style="list-style-type: none"> Computers Salt air environment Volunteer time 	<ul style="list-style-type: none"> Trained volunteers Students
All uniforms reproduced	<ol style="list-style-type: none"> Identify financial opportunities Identify different periods 	<ul style="list-style-type: none"> Time and money Volunteers prepared to wear them 	

Promotion and Product

Opportunity	How might this opportunity be achieved? Getting started; Key steps	Are there potential challenges or barriers to making this happen?	Who could be involved in making this happen? Partnerships; Roles
Promotion, publicity, marketing	<ol style="list-style-type: none"> 1. Marketing plan(s) 2. Financial plan and commitment 3. Marketing expertise 	<ul style="list-style-type: none"> • Financial • Minimum Council support • Lack of site manager 	<ul style="list-style-type: none"> • Overlap with weddings • Incorporate with regular tour offerings
Package tours	<ol style="list-style-type: none"> 1. Weddings – Multipurpose Centre and firing of the guns 2. Use the Multipurpose Centre as 'package tour' office and shop 3. Tours packaged with other heritage experiences e.g. ghost tours, museum, Nobby's, walking tours) 4. Sell packages to tourism wholesalers, retail 5. Regular timed tours for marketing ease 6. 1pm Time Gun for wedding/tour in period costume 	<ul style="list-style-type: none"> • 'Special' experience • Exclusivity cancels other activity • Staffing required to develop pricing and regular delivery of product 	<ul style="list-style-type: none"> • Management operate staffing, tour office and shop • Volunteers operate tours and guiding • Management develop tourism sales, relationships, marketing.
Special events	<ol style="list-style-type: none"> 1. Plays in tunnels 2. Music weekends 3. Cinema outdoors 4. Heritage week and military ceremonies 5. New Years Eve 6. Re enactments 7. Music of the guns 	<ul style="list-style-type: none"> • Overlap with weddings • Incorporate with regular tour offerings 	<ul style="list-style-type: none"> • Volunteers • Management to coordinate and market
Accommodation and sleep overs	<ol style="list-style-type: none"> 1. Barrack rooms with toilets 2. Test market with primary schools 3. Ghost tour in conjunction (adults) 4. Backpackers? 5. Redevelop multi-purpose centre to include tour office and shop (orientation), rename to align to Fort vision (heritage) 	<ul style="list-style-type: none"> • Staffing • Working with Children Check • Security (vandals) • Transport (off-site accommodation) • Determine product • Plan in place • Cost 	<ul style="list-style-type: none"> • Site Manager • Volunteers • Accommodation providers

3. Community Workshop

A community workshop was held at Newcastle City Hall on the 22 July 2013 to discuss the Fort Scratchley Historic Site Plan of management 2008. The workshop was open to all members of the community and promoted widely through local newspapers and radio, Council's website and Newcastle Voice. Approximately 30 members of the community attended the workshop.

Summary of outcomes

Participants identified the following values or elements that they currently enjoyed about Fort Scratchley that the plan of management should maintain and enhance. The values have been grouped into themes.

Social

- The Fort Scratchley Historical Society (experience and engagement with visitors)
- Face to face contact with visitors – the personal touch
- Open space around the Fort
- The playground
- Tourist attraction
- Historic
- Site of only return of fire to Japanese submarine attack in WWII
- Unique military historical site with working guns
- Historical tunnels
- Military museum
- 6 inch MK VII guns
- Dedicated site to past and present service men and women of Australia
- Integral part of the City's history
- Aboriginal history the site
- Archaeological importance at the Nobbys road area
- Activities should not turn the site into a circus
- Recognised unique military historical site
- Heritage – local and national
- Historic link to community – local volunteers
- Fort as a concept is unique
- Location
- Prime location and visibility
- Location relative to the CBD

Aesthetic

- The view over the city and line of sight to other military sites

Creative/ technical

- Working guns

Opportunities

A full list of the opportunities for Fort Scratchley identified by participants are provided in the following table and grouped into common themes. Opportunities listed under 'priorities' include those identified by the table groups as the five or six ideas that they would most like to happen at Fort Scratchley. Opportunities listed under 'other opportunities' are those ideas that were noted on sheets as part of the table discussions.

Most priorities were associated with the 'marketing and promotion' and 'visitor experience' themes. In regards to 'marketing and promotion', the need for publicity, use of social media and packaging tours were mentioned on a number of occasions. In terms of 'visitor experience', opportunities related to broadening the experience on offer through experiential events and other activities considered combatable with the site.

Opportunities for Fort Scratchley

Theme	Opportunities
Resources	<p>Priorities:</p> <ul style="list-style-type: none"> Secure more grant funding More volunteers willing to be there at weekends Set charges for different experiences Council line budget Parking fee Coin donation/ entry fee Keep the prices down – affordable; need bums on seat <p>Other opportunities:</p> <ul style="list-style-type: none"> Tenure for Fort Scratchley Historical Society Financial stability Closer cooperation with Museum and Maritime Centre Need more volunteers – mainly guides, younger people, dedicated Income from activities onsite used for operations Car parking fees Council more involvement in site operations Federal Government – maintenance Funding to maintain the site – grant funding/ alternative funding Fort Scratchley Historical Society young member recruitment program Increased commercial activity
Visitor experience	<p>Priorities:</p> <ul style="list-style-type: none"> Experiential events – searchlight, air raid shelter Better use of site for exhibitions, community groups etc (available for all to use) Pomp and ceremony (theatrics to encourage visitors) Military meal experience – part of tour/ function etc. Cafeteria and cheap food Coffee shop Package deal – three local museums Add to the Fort Scratchley experience by using latest technology e.g. audio tours. Exploration of potential of the site for further activities e.g. dramatic performances, musical performance (e.g. Victorian and later military band concerts), art workshops etc. <p>Other opportunities:</p> <ul style="list-style-type: none"> Overnight stays Experiential events More school involvement – school band recitals On site photographer Day-time hot food and drink facility on site Historic civic functions Better interaction with a more diverse audience More time for coaches and school groups Ghost tours
Museum/ collection/ interpretation	<p>Priorities:</p> <ul style="list-style-type: none"> Completion of the museum to tell the story of the Fort Restore Eastern Embrasure of casemate Review Heritage Management Plan to open up non-specific Fort Scratchley activities Restore original coal mines under the site

Theme	Opportunities
Museum/ collection/ interpretation	<p>Other opportunities:</p> <ul style="list-style-type: none"> Continue to acknowledge pre-fort history Guns in working condition All displays should be in working condition More use of searchlight Set up typical air raid shelter Completion of the museum is critical from an educational point of view The stories should be highlighted in the development of the museum Promotion of the stories through digital media More integration with other historians More/ better use of technology – holograms, projection Night tours, theatre productions (amateur groups) Greater consideration for the Fort as a museum, rather than a venue for a museum – more than just display of artefacts.
Marketing and promotion	<p>Priorities:</p> <ul style="list-style-type: none"> Widespread publicity Use of social media to promote the Fort Council support to the Fort Scratchley Historical Society to tell stories in new ways i.e. website, social media Packaging of tours – information to wholesalers, information on the importance of having a tour “Tourism Circuit” – Fort, Museum, Maritime, Art Gallery etc. Extensive advertising Detailed marketing strategy Publicity to the wider community <p>Other opportunities:</p> <ul style="list-style-type: none"> Extensive advertising required More information for wholesalers to build packages Information/ photo-board in the multi-purpose centre for guests who only attend for event or functions to promote activities at the Fort Increased interaction with other City events
Education	<p>Priorities:</p> <ul style="list-style-type: none"> School excursions (Primary and Secondary) keyed to the new National Curriculum requirements Linked visits with the Fort, Museum, Maritime Museum and other Newcastle iconic sites by schools and the wider community. School excursions – Fort, City history, environment
Community Use	<p>Priorities:</p> <ul style="list-style-type: none"> Improve community involvement 2-3 picnic tables below the guns to encourage people to use the Fort. <p>Other opportunities:</p> <ul style="list-style-type: none"> Better use of site for exhibitions and community groups
Infrastructure	<p>Priorities:</p> <ul style="list-style-type: none"> Traffic management; parking, Nobbys Road, Fort Drive, Esplanade Improve parking Maintaining and improving all Fort infrastructure to optimum level so as to enhance the visual impact for visitors <p>Other opportunities:</p> <ul style="list-style-type: none"> Maintained to the maximum More parking for both cars and buses Weed removal around the northern side Traffic management – speeding along Nobbys road and Fort Drive Planned maintenance – anticipated not reactionary

Achieving Opportunities for Fort Scratchley

Future opportunities were further discussed under each of the themes, in terms of how they might be achieved, the potential challenges and barriers and who could be involved in making them happen. These discussions are reflected in the table below.

Resources

Opportunity	How might this opportunity be achieved? Getting started; Key steps	Are there potential challenges or barriers to making this happen?	Who could be involved in making this happen? Partnerships; Roles
Keep prices affordable	1. Tiered, targeted pricing 2. Annual pass 3. Sponsorship		<ul style="list-style-type: none"> Council Fort Scratchley Historical Society
Gold coin donation or entry fee	1. Honesty box		
Coffee shop	1. Open cafe	<ul style="list-style-type: none"> Contractual issues Volunteers need to understand the importance 	

Visitor experience

Opportunity	How might this opportunity be achieved? Getting started; Key steps	Are there potential challenges or barriers to making this happen?	Who could be involved in making this happen? Partnerships; Roles
Education	1. Grant funding required to research similar initiatives overseas 2. Dressed in theme 3. Ghost stories 4. Recreate day as a convict e.g. build a wall, coal mining	<ul style="list-style-type: none"> Resources (people and funding) 	<ul style="list-style-type: none"> Theatre groups Cruise ship Re-enactment group
Social media	1. Multi-media		<ul style="list-style-type: none"> Fort Scratchley Historical Society more empowered and sense of opportunity
Technology	1. More interactive 2. Holograms 3. Put history into a live document		

Marketing

Opportunity	How might this opportunity be achieved? Getting started; Key steps	Are there potential challenges or barriers to making this happen?	Who could be involved in making this happen? Partnerships; Roles
Packaging of tours "Tourism Circuit"	1. Combine the 3 museums – Regional, Maritime, Fort Scratchley 2. Approach cruise ship companies	<ul style="list-style-type: none"> The management of the three groups must talk and listen to one another 	<ul style="list-style-type: none"> The three museums Cruise ship companies
Social media	1. Must be detailed 2. Marketed correctly 3. Plan strategy	<ul style="list-style-type: none"> Professional help Financial assistance 	<ul style="list-style-type: none"> Council in consultation with Fort Scratchley Historical Society

Museum/collection/interpretation

Opportunity	How might this opportunity be achieved? Getting started; Key steps	Are there potential challenges or barriers to making this happen?	Who could be involved in making this happen? Partnerships; Roles
Broaden the story to attract further visitation	1. Tell the whole story - acknowledge all aspects of the site i.e. convict, commonwealth, coal etc. 2. Undertake additional research 3. Case studies – look at other facilities 4. Fixtures and fittings meet requirements of museum (i.e. remove energy efficient globes from tunnels) 5. Interpretation of the buildings and how they were used 6. Guides/tours	<ul style="list-style-type: none"> Council needs to open to fact that the building is a museum Strong curatorial strategy 	<ul style="list-style-type: none"> Council Fort Scratchley Historical Society Museum
Review Heritage Management Plan to open up non specific Fort Scratchley activities	1. The action should be more about broadening the story and providing for diverse activities at the site as opposed to reviewing/ amending the Plan 2. Bring in further opportunities at the site for people to enjoy.	<ul style="list-style-type: none"> Access to broader range of experts 	

Infrastructure

Opportunity	How might this opportunity be achieved? Getting started; Key steps	Are there potential challenges or barriers to making this happen?	Who could be involved in making this happen? Partnerships; Roles
Access to the site	1. Transport (buggies) for aged/ physically impaired to take them around the site 2. Pick up from overflow parking at 'former SES site'	<ul style="list-style-type: none"> Licence to drive buggy Competent drivers Insurance costs 	<ul style="list-style-type: none"> Sponsors Fort Scratchley Historical Society to manage
Maintenance - Site appealing to visitors	1. Maintenance schedule 2. Regular inspections 3. Feedback card for visitors 4. Address the visual impact – for example remove garbage bins from the entrance		<ul style="list-style-type: none"> Community groups (Lions, Rotary) Court enforced community service orders Sponsors Fort Scratchley Historical Society support
Facilities	1. More picnic tables at the site 2. Sympathetic garbage bins (blend into site facilities) 3. Shed protection for the Time Gun	<ul style="list-style-type: none"> Lack of site security (perimeter) No regular garbage pick-up Reduce graffiti 	<ul style="list-style-type: none"> Community groups (Lions, Rotary) Court enforced community service orders Sponsors Fort Scratchley Historical Society support

Community Involvement

Opportunity	How might this opportunity be achieved? Getting started; Key steps	Are there potential challenges or barriers to making this happen?	Who could be involved in making this happen? Partnerships; Roles
Encourage community groups	1. Enable temporary exhibitions to be held at the Fort 2. Make available for community groups to use the site as well (it is not just for military groups – although they are important as well) 3. Advertise through Newcastle Museum	<ul style="list-style-type: none"> Fees involved for the hire Opening hours Entry fees Security of site 	<ul style="list-style-type: none"> Newcastle Museum

Input received by the community via email (in response to workshop invitation)

Theme	Opportunities
Resources	<ul style="list-style-type: none"> • A director to develop and promote the Fort • Obtain advice and assistance from the National Trust (possibly some on-going funding?) • Establish a souvenir shop of books etc about the Fort, military history of Newcastle and Newcastle generally • More souvenirs for children e.g. fridge magnets, pencils, rubbers, rulers etc. • Sponsored photographs throughout the Fort to raise funds • Approach an engineering company to assist in restoring the Disappearing Gun (Hunter Valley Training College have restored locomotives in a similar way).
Visitor experience	<ul style="list-style-type: none"> • Army-style sleepovers with night time competitive exercise in the tunnels • Candle lit tunnels, stage smoke and audio reproduction of gun fire • Shooting gallery in one of the tunnels to shoot at passing simulated submarines • Visiting marching bands to parade once a month/ school orchestras • Themed dinner • Light and sound show • Make the place an interesting venue to visit, whether it's an upmarket museum and charge \$10 with a mock military style show, or dinner and show. • Establish a café at the Fort (with a liquor licence) • Introduce daily ceremonies such as firing a big gun at noon, changing the guard, rifle demonstrations etc. • Host and cater for private functions in the Fort • Fire the guns more frequently • Audio simulation of enemy forces attacking e.g. headphones and movie show • More interaction with children e.g. storytelling, not just the facts. • More information about the soldiers eg. food rations, seeing in the dark tunnels • After dark tours to see what it was like for the soldiers in battle • School excursions, especially for ANZAC Day • A mock surprise by the enemy • Sound and flashing lights appearing from the tunnels to entice more people to take a tour
Museum/ collection/ interpretation	<ul style="list-style-type: none"> • Volunteers dressed in uniform • Faithfully restore the furnishings, equipment and contents to what was there when the Fort last operated • Seek to acquire some substantial military hardware to be displayed outside the walls of the Fort • Sandbags around the gates • An old army tank on site for kids to crawl over
Marketing and promotion	<ul style="list-style-type: none"> • Secure the Fort as part of a multi-pass museum activity, with guided tours, theatrical performances and re-enactments • Mini-bus to link the museum sites or brochure showing map and parking for cars/ bikes between them. • Printed t-shirts of the Fort to sell the message (including premium shirt "I fired the 6" gun at Fort Scratchley) • Contact every Rotary, Kiwanis, Lions Club and church group in Newcastle, Central Coast and Sydney to suggest a coach load visit with the cost of the tunnel tour built in. • A photographer to capture the "dress-up shots" to make sure they attract interest by showing their photos to others. • Feature articles in the local media
Community Use	<ul style="list-style-type: none"> • Remove the requirement of Council caterers for bookings in the Multi Purpose Centre and Barracks – to provide a more affordable and flexible choice.
Infrastructure	<ul style="list-style-type: none"> • An old troop carrier to collect pre-arranged groups from one of the Foreshore car parks to overcome some of the parking problems.

4. Industry Workshop

An 'Industry' Workshop was held at Newcastle City Hall on the 24 July 2013 to discuss the Fort Scratchley Historic Site Plan of management 2008. Local organisations, groups and/or individuals with an interest or involvement in historic/ cultural sites and/ or museums were invited to the workshop. There were twelve attendees representing the Coal River Working Party, National Trust, Fort Scratchley Historical Society, Newcastle Ghost Tours, Newcastle Museum, Hunter Surf Life Saving and Tantrum Theatre.

Summary of outcomes

Social

- Attractive to the community

Historic

- Interpretation of the story – multiple stories and multiple attractions
- Connected to relevant sites – association with other historical sites (visual and historic value)

Location

- Integration with the environment

There was some discussion regarding the unique potential of Fort Scratchley to tell 'other' stories and link with other historical sites that are a part of the military story e.g. Shepherds Hill. It was also noted that we should be cautious in trying to tell too many stories out of the Fort that should be told by other sites in the city.

Opportunities

The opportunities for Fort Scratchley from the consultations undertaken to date (including email suggestions from the community) were presented to the group. Participants were invited to add further opportunities before identifying which of the opportunities they believed were most important by "voting" with coloured dots. The total number of dots tallied for each opportunity and theme appears in brackets.

The highest priorities in terms of general theme were associated with 'resource' opportunities (15 votes), followed by marketing and promotion (14 votes).

The individual opportunities given highest priority were 'completion of the museum', 'on-line distribution and bookings' and 'marketing plan, promotion and publicity for the site', each receiving five votes.

A general discussion by participants regarding potential opportunities raised the following points:

- The notion of putting effort into three to four key events, which brought together a number of activities e.g. a dinner and theatre production was put forward as being more practical than trying to do something all year round.
- The need to better support the Fort Scratchley Historical Society to focus on their particular interests at the Fort. It was noted that this support might not necessarily need to come from Council and that a broader governance model should be looked at. The potential for a Foundation was put forward as one option or support from other organisations that care and have the skills.

Opportunities for Fort Scratchley

Theme	Opportunities
Resources (15)	<p>New opportunities identified by the group:</p> <ul style="list-style-type: none"> Support and advice from the community and specialists re: museum, marketing, tourism and graphics (4) Forecast on-site expenses for five years to maintain and improve the site and visitors experience. Plan grants and sales/ marketing plan to meet costs at a minimum – it should make money (1) Educational resources (1) The great story and a generous heart Pursue National Heritage status for further funding Raffle (\$) for firing of the guns – 12 open days <p>Previous opportunities receiving votes:</p> <ul style="list-style-type: none"> More volunteers to undertake tours (1) Additional on-site resource (Council) (3) Secure more grant funding (3) Restore furnishing and equipment (2)
Visitor experience (12)	<p>New opportunities identified by the group:</p> <ul style="list-style-type: none"> Ceremonial firing of guns (paid) e.g. birthdays, anniversaries, memorials (3) Restore coal mines on eastern side (2) Accommodation – Master Gunners/ NCO's Quarters/ Commandants/ Servants Quarters (1) Music festivals (1) Symphony under the stars – theatre/ music performances (1) Open days to highlight different historic eras – WWII, 1900s etc (1) Original theatre (professionally created) – tells the story/ uses the site/ shares the \$ Ghost tours, night time tours Light show – interpret coal fired beacon Camping – similar to Cockatoo Island Artist in residence and exhibition Themed dinners <p>Previous opportunities receiving votes</p> <ul style="list-style-type: none"> Experiential events – overnight stay (1) Coffee shop (1) Theatrics to encourage visitors (1)
Museum/ collection/ interpretation (10)	<p>New opportunities identified by the group:</p> <ul style="list-style-type: none"> List of soldiers that have served at Fort Scratchley (1) Light show – sky cannons (revisit the Coal River Precinct Conservation and Cultural Tourism Management Plan 2008 (1) <p>Previous opportunities receiving votes</p> <ul style="list-style-type: none"> Completion of museum (5) Acknowledge all aspects of site history (2) Completion of collection management (1)
Marketing and promotion (14)	<p>New opportunities identified by the group:</p> <ul style="list-style-type: none"> On-line distribution and bookings through Fort Scratchley website, third party websites and on-line distributors. Traditional travel distribution channels (5) Combined and improved FSHS/ Council website (2) Children like to shoot at things <p>Previous opportunities receiving votes</p> <ul style="list-style-type: none"> Marketing plan, promotion and publicity for the site (5) Brochure linking museum sites and Fort (2)
Education (2)	<p>New opportunities identified by the group:</p> <ul style="list-style-type: none"> Joint education with Newcastle Museum and the Maritime Centre about WWII (1) <p>Previous opportunities receiving votes</p> <ul style="list-style-type: none"> School excursions linked to new National Curriculum requirements (1)
Infrastructure (2)	<p>Previous opportunities receiving votes</p> <ul style="list-style-type: none"> Improve and maintain infrastructure (2)

Achieving opportunities for Fort Scratchley

Participants were invited to select those opportunities with the most votes, and in small groups identify how they might be achieved, who might be involved and the potential resources/ funding opportunities available. These discussions are reflected in the tables below.

Resources

Opportunity	How might this opportunity be achieved? Getting started; Key steps	Are there potential challenges or barriers to making this happen?	Who could be involved in making this happen? Partnerships; Roles
Resources	<ol style="list-style-type: none"> Advisory Group/ stakeholder groups Strong partnerships 	<ul style="list-style-type: none"> The City of Newcastle Museum Maritime Museum Fort Scratchley Historical Society 	<ul style="list-style-type: none"> Time and commitment

Visitor Experience

Opportunity	How might this opportunity be achieved? Getting started; Key steps	Are there potential challenges or barriers to making this happen?	Who could be involved in making this happen? Partnerships; Roles
Ceremonial firing of the guns	<ol style="list-style-type: none"> Formulate the “performance” Promote and advertise Have a classy after product 	<ul style="list-style-type: none"> Fort Scratchley volunteers Photographers Design specialists 	<ul style="list-style-type: none"> People pay to have a ceremonial firing of the guns, photograph soldiers in full uniform.
Café/ kiosk	Older people want somewhere to have a cup of coffee and a cheap snack.	<ul style="list-style-type: none"> Contract let to provide this service 	

Museum/collection/interpretation

Opportunity	How might this opportunity be achieved? Getting started; Key steps	Are there potential challenges or barriers to making this happen?	Who could be involved in making this happen? Partnerships; Roles
Acknowledge all aspects of sites' history	<ol style="list-style-type: none"> Support the National nomination for the Coal River (Mulubinba) and Government Domain Once National significance acknowledged, apply for grants on a National level Improved prestige means greater visitor numbers 	<ul style="list-style-type: none"> University CRWP expertise Hunter Heritage Network Federal Member for Newcastle National Trust 	<ul style="list-style-type: none"> Grants Broaden national profile
Completion of the museum (rooms 4,5 & 6)	<ol style="list-style-type: none"> Budget Finalise the story Identify artefacts Collate photographs Graphic Design 	<ul style="list-style-type: none"> Fort Scratchley Historical Society Volunteers 	<ul style="list-style-type: none"> Grants In-kind Sponsorship Revenue

Marketing and promotion

Opportunity	How might this opportunity be achieved? Getting started; Key steps	Are there potential challenges or barriers to making this happen?	Who could be involved in making this happen? Partnerships; Roles
Visitor tour package upgrade	<ol style="list-style-type: none"> 1. Technology – internet, Tourism Newcastle, Fort Scratchley Website 2. Dedicated CEO/ site manager (paid position) 3. Tourism and Economic Services (NCC) 	<ul style="list-style-type: none"> • Fort Scratchley Volunteers • Museum sites in the vicinity • Nobbys • Shepherds Hill • Newcastle NOW 	<ul style="list-style-type: none"> • Agreement as who does the work through the City of Newcastle Council
Marketing and promotion and long term tenure	<ol style="list-style-type: none"> 1. Develop 5 year strategy – overarching financial budget, site revenue and expenses. 	<ul style="list-style-type: none"> • The City of Newcastle • Fort Scratchley Historical Society • A specialist manager • Destination NSW 	<ul style="list-style-type: none"> • Sponsorship • Grants • Revenue

Infrastructure

Opportunity	How might this opportunity be achieved? Getting started; Key steps	Are there potential challenges or barriers to making this happen?	Who could be involved in making this happen? Partnerships; Roles
Visitor tour package upgrade	<ol style="list-style-type: none"> 1. Additional and improved parking facilities (Multi Purpose Centre can hold 150 patrons – there are only 38 car parking spaces). 2. Additional area for coach and bus parking 	<ul style="list-style-type: none"> • The City of Newcastle 	<ul style="list-style-type: none"> • Improved visitation

Appendix E

Legislation

In accordance with 36D of the *Local Government Act 1993*, community land comprising area of cultural significance:

1. A plan of management adopted in respect of an area of land, all or part of which is land to which this section applies, is to apply to that land only, and not to other areas.
2. A plan of management to be adopted for an area of community land, all or part of which consists of land to which this section applies:
 - (a) must state that the land, or the relevant part, is an area of cultural significance, and
 - (b) must, in complying with section 36 (3) (a), categorise the land, or the relevant part, as an area of cultural significance, and
 - (c) must, in complying with section 36 (3) (b), (c) and (d), identify objectives, performance targets and other matters that:
 - (i) are designed to protect the area, and
 - (ii) take account of the existence of the features of the site identified by the council's resolution, and
 - (iii) incorporate the core objectives prescribed under section 36 in respect of community land categorised as an area of cultural significance, and
 - (d) must:
 - (i) when public notice is given of it under section 38, be sent (or a copy must be sent) by the council to the Director-General of National Parks and Wildlife, and
 - (ii) incorporate any matter specified by the Director-General of National Parks and Wildlife in relation to the land, or the relevant part.

Categorisation and Core Objectives

The Act (Section 36) requires that all Community Land be categorised. A category describes the land and has a set of core objectives. All current and future uses of the land must comply with the core objectives.

The core objectives for management of community land categorised as **cultural significance** are:

1. to retain and enhance the cultural significance of the area (namely its Aboriginal, aesthetic, archaeological, historical, technical or research or social significance) for past, present or future generations by the active use of conservation methods.
2. Those conservation methods may include any or all of the following methods:
 - (a) the continuous protective care and maintenance of the physical material of the land or of the context and setting of the area of cultural significance,
 - (b) the restoration of the land, that is, the returning of the existing physical material of the land to a known earlier state by removing accretions or by reassembling existing components without the introduction of new material,
 - (c) the reconstruction of the land, that is, the returning of the land as nearly as possible to a known earlier state,
 - (d) the adaptive reuse of the land, that is, the enhancement or reinforcement of the cultural significance of the land by the introduction of sympathetic alterations or additions to allow compatible uses (that is, uses that involve no changes to the cultural significance of the physical material of the area, or uses that involve changes that are substantially reversible or changes that require a minimum impact),
 - (e) the preservation of the land, that is, the maintenance of the physical material of the land in its existing state and the retardation of deterioration of the land.

3. A reference in subsection (2) to land includes a reference to any buildings erected on the land.

The core objectives for management of community land categorised as **park** are:

1. to encourage, promote and facilitate recreational, cultural, social and educational pastimes and activities, and
2. to provide for passive recreational activities or pastimes and for the casual playing of games, and
3. to improve the land in such a way as to promote and facilitate its use to achieve the other core objectives for its management.

The core objectives for management of community land categorised as **general community use** are:

1. to promote, encourage and provide for the use of the land, and to provide facilities on the land, to meet the current and future needs of the local community and of the wider public:
2. in relation to public recreation and the physical, cultural, social and intellectual welfare or development of individual members of the public, and
3. in relation to purposes for which a lease, licence or other estate may be granted in respect of the land (other than the provision of public utilities and works associated with or ancillary to public utilities).

Appendix F

Key resource documents

Coal River Precinct Conservation and Cultural Tourism Management Plan 2008.
Boyce Pizzey Strategic.

Fort Scratchley Historic Site, Exhibition Strategy Moveable Heritage, 2008,
International Conservation Services.

Fort Scratchley Historic Site Heritage Management Plan 2008,
Australian Government Department of Finance and Deregulation, Suters and Dawbin.

Fort Scratchley Historic Site Plan of management 2008,
The City of Newcastle.

Fort Scratchley Historic Site Tour Guide 2008,
International Conservation Services.

Fort Scratchley Historic Site Strategic Plan 2012–2016.
The City of Newcastle.

Fort Scratchley Historical Society; Significance of the Collection October 2011,
Bill Storer.

Heritage Interpretation Works Plan, Fort Scratchley, Newcastle, 2008,
International Conservation Services.

Newcastle Heritage Policy 2013,
The City of Newcastle.

