



Consultancy Brief for Business Plan

Background

Bailiffgate Museum & Gallery is a volunteer-run visitor attraction which is open 6 days a week for 50 weeks a year.

Our museum exists to preserve, record and make accessible the history of Alnwick town and district and to showcase the work of local and national artists within a vibrant, stimulating and aesthetically pleasing environment for the benefit of the community.

As a community museum and one of the largest arts spaces in north Northumberland, we bring cultural opportunities to the most rural county in England. In recent years, this has seen us bring high profile exhibits to rural north Northumberland as well as working in rural and isolated communities where only a few hundred people (or less) may live to celebrate and showcase their unique heritage, traditions and culture.

Each year we welcome 10,000 visitors. Our permanent collection which is displayed across two floors of the museum offers a journey through 10,000 years of history in Alnwick and district. Upstairs in the gallery, we showcase local heritage, traditions and artworks alongside national activity through an ambitious seasonal exhibitions programme. Recently, this has included Illustrating Harry Potter (on loan from Seven Stories, National Centre for Children's Books), paintings from acclaimed artist Stella Vine, and 100 years of Fashion in collaboration with super model, Stella Tennant and featuring designer's gowns and accessories including Prada, Dior and Stella McCartney from her personal collection and a collaboration with Jorvik Museums to bring 'The Vikings' to Northumberland.

We are proud to offer opportunities which enable local people to access cultural experiences and activities not normally available in rural settings. Workshops, talks and targeted activities help to bring local people closer to their heritage and culture. School activities and outreach projects take our collections into communities and help them to discover more about their local heritage and to present it to others through, stories, artefacts and their own voice. Our ambitious programme also ensures we build on our success in attracting visitors from across the world. We support green energy and want to make a sustained contribution to becoming carbon neutral.

Bailiffgate Museum & Gallery is a registered charity and an accredited Museum. We employ one part-time Administrator, and a cleaner. Other consultancy posts include Transition and Programme Manager for the Northumberland Hall project and a Project Manager for our 'This is Alnwick' project together with an administrator. All

other tasks that keep our museum open every day are provided by volunteers with targeted support from external consultants. Main areas of work include Front of House, collections curation, exhibitions, organising events, recruiting volunteers, education, retail, contract management, finance and fundraising, marketing and social media, IT, AV and website development.

We are a membership organisation governed by a board of up to 12 trustees with 11 member representatives (Friends of Bailiffgate Museum) and one trustee nominated by the Alnwick Town Council. Currently we have eleven trustees with one vacancy. The board meets 6 times per year. Each of our trustees has delegated responsibility for an area of our work, to provide a point of contact on the board and facilitate effective links between the board and volunteer teams.

Day to day operations is co-ordinated by our Operational Management Group (OMG) which usually meets monthly. This is chaired by a volunteer and attended by volunteer representatives from different areas of museum operations (education, collections, exhibitions, marketing, retail, website, volunteers etc).

The Museum is recognised for its high standards and professionalism and is well supported by Alnwick Town Council, Northumberland County Council, and Tyne and Wear Archives and Museums.

Our commitment to our Volunteers

Much of Bailiffgate Museum & Gallery's success comes from the strong commitment of our 50+volunteers who bring a wealth of expertise, dedication, loyalty and pride to our organisation. We recognise that volunteering is a two-way process which we try to ensure benefits the volunteers as well as the Museum.

The organisation is committed to using fair, efficient and consistent recruitment procedures for all potential volunteers. We aim to include opportunities for all volunteers who reflect the diversity of the local community and as an organisation we aim to identify appropriate roles to make the most of what volunteers offer, in line with our Strategic aims and objectives. Our Volunteer Strategy is that "Everyone is welcome".

NLHF Project – Northumberland Hall

Bailiffgate Museum & Gallery has been successful in being awarded £189,988 by the NLHF as the Development phase of a major project as part of the Alnwick Place regeneration plan. The project will transform Northumberland Hall, a Grade 1 listed building in the heart of Alnwick into a creative, cultural hub where collections and exhibitions bring to life the past, present and imaginative narratives that celebrate our place and its people.

If the development phase is successful then we will submit our second-round application for the full delivery round which includes reinterpreting our collection and developing an innovative, creative heritage experience for visitors and local people in the heart of Alnwick.

We want to make the most of this unique opportunity to contribute to the economic, cultural and social development of Alnwick and surrounding areas to create an

innovative, community led museum for those who live and work in Alnwick and an outstanding experience for visitors.

Vision

Our ambition is to become a dynamic and inclusive cultural and creative hub in the heart of Alnwick, which builds local skills, pride and confidence and is a catalyst for the regeneration of the town. The experience will share the past, present and imaginative narratives of NE66 and celebrate our place and its people, co-curated by our communities and delivered with our partners.

Relocating to Northumberland Hall, set in the heart of Alnwick's historic marketplace, is an opportunity for our volunteer-run local history museum to reimagine itself as a creative cultural community-led hub for Alnwick and district. The central location and greater space offered by the Hall will provide new programming opportunities to work more effectively with our volunteers, community groups, schools and local businesses, and reach out to new and different audiences, to celebrate local stories and showcase our creativity. We will create a thriving new inclusive, engaging and family-friendly destination with a more sustainable future, by building capacity and new revenue streams that will enable us to develop our team's skills, resources and partnerships as well as generate income.

We will be a new, vibrant and very visible presence in the marketplace, and a catalyst for the regeneration of the town. To achieve this, we want to change what we are, who we work with and how we present narratives of Alnwick and district. We will build new relationships and help grow a strong sense of local pride and ownership through the stories we tell, the collections we showcase and the engaging activities we offer collectively and collaboratively. In particular, we will work with local schools, youth groups and young adults through partnerships, so children and young people can help us shape and deliver our offer effectively. We will also focus on developing our offer to enhance accessibility and diversity by meeting the needs of key groups with special needs, including local home-education families and SEND groups].

Summary of work to be undertaken

Bailiffgate is in the process of preparing a full bid to secure a £2.5m HLF grant towards the £2.8m cost of restoring the building, reinterpreting its collection and developing an innovative, creative heritage experience for visitors and local people in the heart of Alnwick and requires a business plan for the organisation which aligns with the NLHF Heritage 2033 investment principles.

A scoping meeting with Trustees, consultants, project manager and other partners involved in the project will crystallise outcomes, expectations and timescales, identify where and from whom information can be sought and the main messages to be conveyed.

The Plan will include:

An Executive Summary that gives a clear overview of the project, its expected impact, outputs, benefits, target audiences and how the project will be managed.

Background information about Bailiffgate Museum & Gallery, its track record and experience and its capacity to undertake the project, its current management, volunteer support, its relationship with other partners and its centrality to the regeneration programme of Alnwick Town.

Development of the project so far, its role in safeguarding a significant listed building; the need for a timely intervention to keep pace with the regeneration of Alnwick.

The achievements to date including the feasibility study, extensive consultation, completion of RIBA 0-3, the completion of an HLF and volunteer funded oral history project and other early work.

Outcomes of research, key findings, results and subsequent actions.

The Strategic background relating to socio economic statistics, data on tourism and footfall and well defined, measurable project outcomes and objectives as set out in HLF guidance that reflect the ambitious programme for Alnwick, its people, their communities, tourism and heritage.

Include the links to a growing network of culture and heritage and demonstrate how the project will contribute to the regeneration of Alnwick Town Centre, to job creation and to regional and national priorities for growth.

Project details based on the work done to date and refined as work progresses and the outcomes of development help us to refine, clarify and finalise the delivery stage of the project. This will include the capital work and the operation phase, once the hub is launched. It should include a robust account of financial stability and the main elements that will secure a sustainable, well managed facility with a clear path to future growth.

Market Appraisal will provide the detailed account of sustainability, growth, resilience and good management of the listed building drawing on the wide range of data available that relates to tourism such as STEAM reports, audiences, education, spending patterns of the sector, comparisons with similar ventures as well as local, national and regional trends. Taking full account of any Political, Strategic, Technological, Economic, Environmental and Legal constraints and advantages.

Financial Appraisal will provide a robust analysis demonstrating financial stability, resilience and sustainability once the capital work is completed.

Capital costs and funding for delivery should include all sources of funding, should demonstrate that the work is realistic and achievable as well as representing a good investment for HLF. It should also set out all costs and income related to the delivery and launch of the project.

Development phase

Baseline current operational costs and set out the new operating model, including testing, funding and sustainability of various staffing models, volunteer led work, income and costs (profit and loss account) and all information required to submit to the financial section of the NLHF bid.

Include forecast for capital and first three years of the operational phase and a capital project cash flow.

Governance management and staff

Work with Bailiffgate to agree all staffing arrangements and terms of engagement and lines of responsibility and accountability with members of the Bailiffgate Team.

Risk Assessment & Management

Work with the project manager to develop an effective process to identify, record, monitor and mitigate any risks. Ensure that there are clear lines of accountability for assessing risks and managing mitigation.

Evaluation

Work in co-operation with the consultancy appointed to carry out evaluation referencing arrangements for monitoring and evaluation in the Business Plan.

Methodology

Please set out how you will use this plan and other research to create a high-quality final draft of the business plan for the delivery stage of this project, should Bailiffgate be invited to progress to this stage.

Please set out how you plan to use your time and expertise to meet the aims and objectives of this commission. This should refer to any additional work, such as familiarisation with the project and drafting time not specifically outlined in your proposal.

Outputs

A high-quality Business Plan will be the main output from this commission. The information in the plan will be used to help us prepare other funding bids. Test through the business planning stages various staffing models and income generation models to ensure sustainable funding of the Northumberland Hall project.

The plan:

- A4 word documents available electronically and on pen drive
- Main text Arial point 12
- Data in excel for easy access
- Draft copies should be provided two weeks before the deadline dates for comments from Trustees
- Final copies should be sent as PDF and should reflect any additional specifications set by Grant Funders
- A slide presentation should be provided setting out the main findings; conclusions and any recommendations that may be relevant to subsequent phases

The timescales for this work are important to enable Trustees to meet the expected timetable and standards set by stakeholders and grant funders.

Payment will be within 10 days of successful delivery of all required outputs.

Indicative Timetable, subject to funding

Work commences: 1 August 2024

Business Plan to Bailiffgate: 18 October 2024

Award Criteria

Your proposal for undertaking the work should include:

1. Detailed methodology for undertaking the evaluation
2. Outline of the internal responsibilities, resources required
3. Details of any interviews, data required from Bailiffgate
4. Experience and expertise of staff allocated to the business case and bid writing
5. Two references for similar work undertaken within the last five years
6. Backup arrangements if any of the allocated staff become unavailable to complete the work
7. The project manager and lead contact (if different)
8. The allocation of days between members of the team
9. The daily charging rate of individual staff involved
10. A timescale for completing the Business Plan with key milestones

All proposals submitted will be evaluated by Bailiffgate against the following criteria:

1. To what extent does the proposal demonstrate an understanding of the issues (including social values) related to this brief?
2. To what extent are the methodology and methods appropriate to the requirements set out in this brief?
3. What degree of experience does the bidder demonstrate in order to successfully complete the work?
4. How well has the bidder structured a team in order to successfully manage the contract and deliver the required work to the budget and timetable required?

Please provide a table showing:

- costs including expenses; including and excluding VAT
- days allocated and day rate per employee including and excluding VAT
- any additional resource requirements

Trustees have set a budget for this work and will be relying on grants and volunteer contributions to complete this project. As a Registered Charity we are keen to use public money wisely and will not be in a position to make any awards outside this financial envelop, even though it spans a five-year period.

Business Plan: 25 days @ £350 - £600 & VAT (based on an indicative assumption that it will require 8 days research; 10 days senior analyst; 5 days drafting and constructing plan)

Total budget: £15,000 & VAT

Management of the contract

The contract will be awarded by 1 August 2024, subject to grant funder's award process. The Business Case should be submitted to Bailiffgate by 18 October 2024.

The anticipated maximum for is £15 000 to include expenses, but excluding VAT
The contract will be let by Bailiffgate Museum & Gallery.

**Please submit invoices to The Treasurer, Bailiffgate Museum & Gallery.
All other communication should be with the Chair and Company Secretary of
Bailiffgate Museum & Gallery/ Transition & Programme Manager**

Procurement process

Proposal return deadline: 5pm on 19 July 2024

Bailiffgate Museum & Gallery will notify bidders by telephone of our procurement decision by 1 August 2024, and this will be followed by email confirmation.

Please submit proposals, marked CONFIDENTIAL Business Plan to Bailiffgate Museum & Gallery for the attention of Chair of Trustees to arrive no later than 5pm on 19 July 2024.

Email to: companysecretary@bailiffgatemuseum.co.uk

Or post to:

Chair of Trustees

Bailiffgate Museum & Gallery

14 Bailiffgate, Alnwick NE66 1LX

Marked CONFIDENTIAL Proposal for Consultancy Brief for Business Plan

The proposal should arrive no later than 5pm 19 July 2024