



# Ripon Museums Trust

## Fairer Futures

## Tender Brief





Made possible with

**Heritage  
Fund**



## Business Planning Consultant Brief

### 1. Introduction

Ripon Museum Trust (RMT) was established in 1982 and runs three museums in the heart of Ripon. We are a small Registered Charity and Limited Company. RMT tells the interlinked story of poverty, law, crime, punishment and justice - using a Grade II Victorian Workhouse Museum, Grade II\* Liberty Gaol and Police Station, Grade II\* Georgian Courthouse and a collection of 9000 objects to explore our themes. Community engagement helps us share stories of this unique heritage prompting people to act for a fairer society. We tell the story of the buildings themselves, the people who lived and worked in them and across all three sites. We put learning at our heart - delivering a changing programme of exhibitions, events, school visits and informal group learning. **Learning is a key Value for RMT – whether directly delivering learning activities, supporting learning within our communities or as continuous organisational learning.** RMT is an Accredited Museum and a Band One National Portfolio Organisation (NPO) with Arts Council England (ACE).

**Our Trust's Vision** is to use our Heritage Assets to Inspire People to Seek a Fairer Society. Our Museums' Mission is to use the unique trio of the Workhouse, Prison & Police and Courthouse Museums, collections and the stories they tell to help people explore big issues such as fairness, equality, justice and welfare. Through excellent engagement, programming and outreach, together we will inspire people to become compassionate and active citizens, shaping society for the better. We will work for greater participation in our heritage which will enrich lives and improve wellbeing. Volunteering is integral to our organisation, at our core we work as one team. We will make a positive impact on Ripon and the region's cultural and economic capital.

Ripon Museum Trust is an equal opportunity employer and adheres to Fair Recruitment. We welcome applications from all suitably qualified persons regardless of their race, sex, disability, religion/belief, sexual orientation, gender or age. We have Equality and Diversity Policy, Safeguarding Policy and procedures and Data Protection Policies. We are committed to reducing our carbon footprint and have an Environmental Policy.

### 2. Ripon Museum Trust: Inspiration for a Fairer Future Project

Our 'Fairer Futures' Project is worth £2.25M and is a substantial first step to delivering our 'Master Plan' for the Trust's future. Delivery of this Project will make significant strides towards achieving our Vision, transform the visitor experience and our engagement work with communities. It will create inclusive new spaces in the Workhouse Museum, open up previously unseen rooms and make our heritage accessible to a wider more diverse audience across all three museums. The Project will use joined up stories of the people who lived, worked and suffered at our three sites. We will make better use of our outdoor spaces and of digital techniques for more immersive engagement. The Project will secure our future and lower our carbon footprint through environmentally sustainable building improvements. The idea for our Project was born out of unease with growing social inequalities which have been exacerbated by the pandemic. A powerful new Vision for the use of our heritage emerged; to use it to inspire people to seek a fairer society. Over the last 3 years we have continued to develop these ideas and we have consulted widely. Our project has 6 main strands:

**Conservation** of key areas of the Workhouse i.e., Main Block (recently acquired with a Heritage Lottery Fund grant). Conservation work will provide us with new spaces for activities, interpretation and learning. A lift will give access to the former dormitories which will be restored. We will prioritise eco-friendly design; a new roof, an air source heating

system and improved insulation will all reduce our carbon footprint and help us become more resilient. Access to and conservation of these areas will ensure preservation of the stories and heritage for the future.

New **interpretative techniques** will connect stories and visitor experiences across all three museums. With communities we will tell multi-layered stories of those who lived and worked here, bringing the story up to date. We will create a better-quality visitor experience, use digital and other interpretation for outdoor spaces at the Workhouse, improved internal spaces for learning, volunteering and other programming.

**Community engagement** and co-production will build on our work with people whose voices are often invisible in history. There will be exciting opportunities for new activities at all our museums engaging new people and communities and for placemaking. These build on our work as an NPO and the unique projects we have already delivered.

Our work to improve **Wellbeing** will be built into our activities and reflects our ambition to be become a place that demonstrably improves people's wellbeing.

**Volunteering** is at the heart of what we do, and we will expand and build on this work.

The value of our work on **placemaking** will increase by generating community wellbeing. We'll build on successful partnerships to develop activities to better explain our heritage. The Project will feed into master planning for the regeneration of Ripon's economy and bringing a wider sense of history and place.

### **Brief to support the production of a Business Plan**

RMT wishes to appoint an experienced consultancy team or individual consultant who can work with us to deliver a realistic and sustainable 10 Year Business Plan to assist the Trust's financial planning and decision making. The development of the Business Plan needs to have buy-in from Trustees, staff and our large community of volunteers an important role to play in making commercial activity successful and providing excellent visitor services. The Trust submitted an Outline Business Plan as part of our Development Phase submission and that will form a starting point for the work of this consultant. The Trust are planning to submit a Round 2 application to the National Lottery Heritage Fund in November 2023.

RMT are seeking a Business Planner who will act as our advisor and critical friend during the Development Phase. We expect this advice to be 8 – 12 days to support us in delivering the Business Plan. We expect you to advise on the following issues:

- Provide the RMT team with a 'table of contents' for us to fill baseline data and assumptions for feedback and assistance.
- Governance/management structures
- Operating model and forecasting such that monitoring and evaluation is effective
- Assumptions underpinning income and expenditure, the market and the opportunity
- Risk assessment, sensitivity analysis
- VAT (in conjunction with our accountants)
- Advice on retail and other trading viability
- Act as a proactive critical friend (and a fresh pair of eyes) during preparation of our Business Plan
- To ensure and check that we prepare this Business Plan in accordance with National Lottery Heritage Fund guidelines (including financial appraisal)
- Provide support for the team preparing for the National Lottery Heritage Fund Mid Term Review (Summer 2023) and Delivery Phase submission.
- Liaise with the rest of the consultancy team as required.

### **3. Management**

The Business Planning Consultant will report to the Director and provide reports as required to the project team and Project Board. There will be close liaison with the Trust's Trustee Treasurer and VAT advisor. Consultants will be

required to report as required via written report or attendance in person or virtual at project meetings and to keep the group involved in the development work. All interdependencies between other consultants' Briefs must be taken into account.

#### 4. Timescales

Brief supplied	January 2023
Deadline for questions	5pm 6 <sup>th</sup> February 2023
Submission	12 Noon Monday 13 <sup>th</sup> February 2023
Interviews	w/c 27 <sup>th</sup> February 2023
Consultants appointed	March 2023
Contract completed	November 2023 (Subject to discussion)

The programme will be worked up in further detail with the appointed team but there is currently a desire to work to a November 2023 second round submission which it is noted is challenging and will require further discussion. The programme has a hard deadline of completion by February 2024 due to the grant expiry date. This will need to be considered in the costs.

#### 5. Fee

There is a budget up to £5,000 (excl of VAT) and inclusive of all travel/subsistence.

#### 6. Submission requirements

Tenders should include:

- Enthusiasm and awareness of working within the independent museum sector
- Proposed fee structure with a breakdown of day rates 8-12 days, depending on your fee structure. Travel time for site visits should be clearly set out and are included in the total fee.
- Proven track record and experience within the last 3 years of preparing business plans for independent museums and/or heritage sites of a similar size/scale. List out these projects and the role your consultancy played within them including those funded by the National Lottery Heritage Fund
- A description of your approach to delivering business plans with key milestones.
- Examples of your experience preparing business plans preferably for projects.
- Programme including key milestones
- Provide evidence of Insurances required – Professional Indemnity of £2m, Public Liability of £5m, Employers' Liability £5 million
- State availability for interview w/c 27<sup>th</sup> February 2023.
- CVs (4 pages each) for key team members including membership of relevant professional bodies and adherence to professional standards
- Contact details for at least two referees
- Maximum Tender page length 10 pages
- Tenders must be signed by CEO, business owner or equivalent senior representative of the Consultancy.

Please contact our appointed project manager Elanor Hazlehurst on 01543 414 777 or via email at [elanor.hazlehurst@greenwoodprojects.com](mailto:elanor.hazlehurst@greenwoodprojects.com) for all enquires. Please return all submissions to Elanor Hazlehurst via [elanor.hazlehurst@greenwoodprojects.com](mailto:elanor.hazlehurst@greenwoodprojects.com) by **12pm noon February 13<sup>th</sup> 2023**.

#### 7. Selection Information

Submissions will be assessed on; appropriate experience; a clear understanding of the requirements of the project; a proven track record of successful delivery of similar projects; an approach which is good value for money. We would also like to see evidence of good team working and of successful completion of National Lottery Heritage Fund funded projects.

- Selection will be based on a Price/Quality Scoring split of 30%/70%. Quality is an equal split between Experience and Approach
- Panel Interviews
- References
- National Lottery Heritage Fund Sign Off

Please see below for an outline of the evaluation criteria:

Evaluation Criteria	Rating (0-5)	X	Weight	=	Total
<b>Related Project Experience</b>					
a. Qualifications and experience of the proposed team. As detailed on CV's supplied		X	3	=	
b. Proven track record within the last 3 years of undertaking similar evaluation projects. At least one project must have National Lottery Heritage Fund funding.		X	4	=	
<b>Proposed Methodology</b>					
a. Detail on your methodology, including market assessment approach and proposed programme.		X	4	=	
b. Outline how you will work with the RMT team and wider project team.		X	3	=	
<b>Price</b>					
Fixed and Firm Cost with full breakdown of day rate, resource allocation and expenses					
<b>Grand Total</b>					

## Price Evaluation

Price will count for 30 marks and will be evaluated on the basis of each Tenderer's tendered prices as set out.

The lowest overall tendered price will score full marks for price.

The marks for price for each other Tender will be calculated by the following formula:

$$\text{Maximum marks for Price} \times \frac{\text{Price of lowest priced Tender}}{\text{Price of Tender being evaluated}}$$

## 8. Additional Information

Tenderers must keep their tenders open for 90 days. RMT is committed to procuring goods, works and services locally whenever possible and in an environmentally responsibility manner. We are committed to equality and diversity and

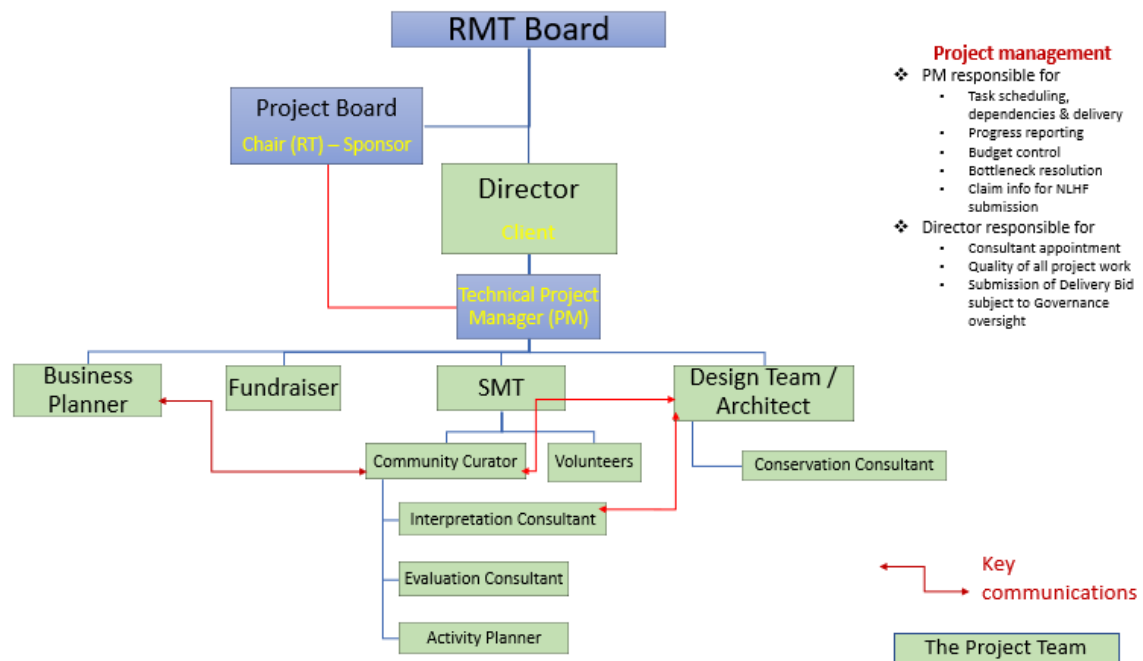
will assist tenderers to gain access to the process. We will use guidance from the National Lottery Heritage Fund for the creation of Briefs and Contracts.

## **9. Appendices**

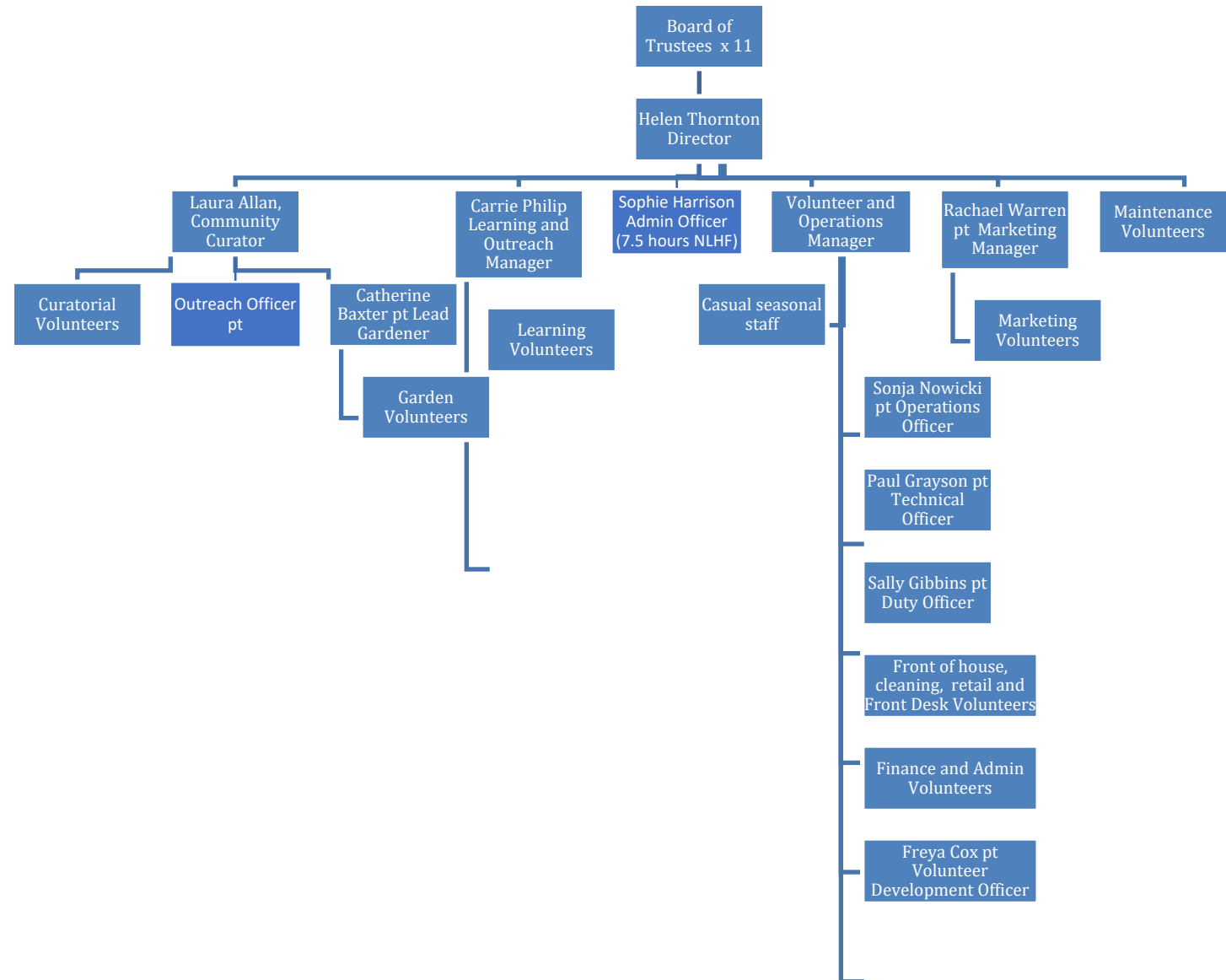
Project organisational chart.

RMT staff organisational chart.

Outline Programme



## APPENDIX G – Key responsibilities of RMT staff July 2021





## **Key responsibilities**

### **Director ft**

- Strategic direction
- Financial and performance management
- External relationships (ACE etc)

### **Volunteer and Operations Manager ft**

- Management and development volunteers
- Visitor Services, access and facilities management
- Environmental Action Plan lead

### **Learning and Outreach Manager ft**

- Learning Programme development
- Developing new approaches to learning including digital
- Manage Learning Volunteers

### **Community Curator ft**

- Community Engagement
- Collections Management
- Manage Curatorial Volunteers

### **Marketing Manager pt**

- Marketing and PR Strategy
- Social media and digital content

### **Lead Gardener pt**

- Develop and manage three historic gardens
- Manage Garden Volunteers

### **Operations Officer pt**

- Front line and administrative operations

- Income development

#### **Volunteer Development Officer pt**

- Support for volunteers with additional needs
- Mental Health and Wellbeing for all volunteer teams

#### **Technical Officer pt**

- Informational Technology hardware and software support

#### **Learning Officer pt**

- Delivery of learning sessions/digital to schools and other learners
- Programme administration

#### **Outreach Officer pt**

- Delivery of outreach sessions to community groups
- Community engagement

#### **Duty Officer pt**

- Front line customer services and rotas
- Visitor data

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Date: Thu 05/01/23

Task  Split  Milestone  Summary  Project Summary  Inactive Task  Inactive Milestone  Inactive Summary  Manual Task  Duration only  Manual Summary Followup  Manual Summary  Start only  Finish only  External Tasks  External Milestone  Deadline  Progress  Manual Progress 