



BRIEF FOR BUSINESS CONSULTANTS

‘HIGHLAND MUSEUMS – OUR COLLECTIVE FUTURE’ PROJECT

Introduction and Background

The Highland Museums Forum (HMF) was established in 1990 with the aim of being a sector self-help organisation which crossed the public/independent sector boundary and to provide training to assist small museums to gain Registration, now known as Accreditation. By 1996 the Forum was working with the Highland Council (HC) to develop a single Service Level Agreement (SLA) for 19 independent museums which resulted in financial support from HC.

These museums still receive some SLA funding, responsibility for the administration of which was recently transferred from Highland Council to High Life Highland (HLH). However, funding has been dramatically reduced over the past five years and the latest dramatic 45% reduction to this core funding means that the independent museums in the Highlands are threatened with closure, unless they can identify means of substantially increasing their income and reducing their costs. In light of this challenge, the Highland Museums' Forum (HMF) is leading a funded project to strengthen the partnerships between the independent museums in the Highlands on all levels and to increase their economic sustainability and future resilience.

The Task

The independent museums in the Highlands are aware of the need to change operating practices to cut costs and achieve efficiencies where possible. These museums are already operating with high levels of efficiency and some rely entirely on volunteer effort. It will therefore be a challenge to find efficiencies at individual museum level. To this end an expert in business processes and operational efficiency is sought to provide expertise and advice.

Specifically, the task will involve undertaking an audit of individual independent museums and developing a strategic plan for their future, economic sustainability. The audit would scrutinise, inter alia:

- governance issues
- economy, efficiency and effectiveness of business processes
- income generation opportunities
- viability and sustainability
- potential for adding value through shared resources, skills, knowledge
- potential for economies of scale and collective purchasing

As a range of skills and specialist knowledge is required to carry out the audit, it is expected that the successful contractor will source external expertise to fulfil the remit of the brief. The types of proficiencies required would include for example legal, accountancy, research, marketing, retail and catering expertise. As well as a detailed audit of individual museums and the development of a strategic plan a fundraising strategy will also be produced.

This will investigate:

- Short term fundraising opportunities, such as project grant funding
- Longer term opportunities such as sponsorship and trust funds
- Identify where expertise may be best used for specific income generation, e.g. a professional fundraiser may have more expertise in attracting income through corporate sponsorship or trusts than through writing grant applications

It is expected that recommendations resulting from the Audit, Strategic Plan and Fundraising Strategy will inform the development of a new HMF constitution. Advice will be provided to the HMF to create a new constitution which is fit for purpose and will provide an agreed way forward for members.

Relationship with other Project Contractors

A Project Co-ordinator will be contracted for the duration of the project (to October 2018) and will work to support the steering group while maintaining clear lines of communication with all other contractors. From October 2017 a Fundraising Consultant and Development Officer will join the project. A working relationship with these contractors should be established to ensure that they embed the findings of Phase 1 into their work.

Workscope Phase 1: June to October 2017

Briefing material on each museum will be provided at the start of the contract. The Project Co-ordinator will be available to assist the appointed consultant with subsequent information gathering, scheduling meetings etc.

A start up meeting will be convened (probably by Skype) which will be attended by representatives of the Forum Steering Group and Museums Galleries Scotland. The detailed work plan will be agreed at this meeting.

A visit will be made to each museum, assuming an approximately half day session with each, which will include staff/trustees as appropriate. A small number of museums may require specialist advice on catering, retail or other generated income potential. For the purposes of costing, consultants should assume that two days of catering advice and five days of retail advice will be required. Retail advice may include looking at developing a database of useful suppliers, the prospects for collective purchasing and workshop(s) on good practice. If any further advice is required, by agreement, core team consultant days will need to be adjusted within the contracted lump sum fee in consultation between the consultant and the nominated client contact person to accommodate these.

Arising from this, each museum will receive a detailed audit with clear recommendations which will form the basis of a strategic plan. The recommendations will be presented in a draft Phase 1 report which will be presented to each museum individually in advance of a face to face meeting, potentially in a central venue. It is expected that for some museums this will be a difficult discussion with recommendations challenging staff and board members' perspectives on the way forward. A final version of the Phase 1 report will then be prepared, including recommendations for the subsequent implementation work to be undertaken by the Forum's appointed Fundraising Consultant and Development Officer.

Workscope Phase 2: November 2017 to June 2018

Over the period from November 2017 to June 2018, the consultant will be available to provide mentor support to the individual museums as they implement the recommendations and actions from Phase 1. The following documents will also be produced taking into account the individual plans for each museum:

- A strategic plan for the museums as a collective.
- A fundraising strategy
- Advice to the HMF to create a new constitution which is fit for purpose and will provide an agreed way forward for members.

For the purposes of costing, consultants should assume that approximately 75% of the budget will be used in Phase 1 and 25% in Phase 2.

Timetable

The contract is envisaged to start in June 2017 with Phase 1 completed by the end of November and Phase 2 completed in June 2018.

Costs

It is anticipated that the work will have a total fee of £45,000 (including VAT – the Forum is not VAT registered). The consultant will be expected to confirm the tasks to be carried out within the specified timescale and budget.

Reporting

The project will be managed by HMF committee. The nominated contact person is Alison Boyle, Chair, Highland Museums Forum alison@highlandmuseumofchildhood.org.uk

The consultant is expected to liaise with the nominated officer throughout the contract as reasonably required and agreed at the start up meeting. An electronic copy of the final versions of the Phase 1 and Phase 2 reports should be submitted by the agreed deadline dates.

Your Proposal

Please submit a proposal detailing:

- Your understanding of issues specific to sparsely populated rural and semi/rural communities
- Your understanding and sensitivity to work with a diverse group of small museums with contrasting governance and operational arrangements
- Your proposed method of operation and an outline of your approach for this consultancy work
- Previous experience of delivering similar contracts

Please also provide details of:

- The names and contact details of two people we can contact for references
- The name of the individual (or individuals) who would be involved in delivering this project, together with details of their relevant experience
- Availability, (and any period of non-availability), for the proposed consultancy period

- The minimum number of days that would be committed to deliver the contract
- The fee chargeable and a breakdown of anticipated costs
- Details of your public liability and professional indemnity insurance cover

The successful contractor should demonstrate:

- A track record of assisting organisations in undertaking strategic business reviews for small and medium sized cultural organisations or museums
- The necessary experience and skills to undertake a business process audit and make recommendations on process-based changes
- An understanding of and experience of working in, or with, the Third Sector
- A flexible, adaptable approach to working with a combination of museum professionals and volunteers
- Excellent interpersonal and communication skills

A pack of background information on the museums and HMF is available on the Museums in the Highlands website www.museumsinthehighlands.com/news.asp

Please submit your tender to:

Alison Boyle, Chair of Highland Museums Forum alison@highlandmuseumofchildhood.org.uk

Submissions will be accepted until 5pm, Friday 5th May 2017.

Date of brief

14th March 2017.

Interviews for short listed consultants will be held in Inverness either at the end of May or beginning of June.