



THE WILLIAM SALT LIBRARY

STAFFORDSHIRE HISTORY CENTRE PROJECT

Staffordshire History Centre: Connecting people to collected stories and heritage of Staffordshire

Project Tender Specification Business Plan and Fundraising Consultants Appointment Nov 2016

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1. Introduction

Staffordshire Archives and Heritage (SAH) is working in partnership (lead partner) with the William Salt Library Trust (Registered Charity no. 528570) to deliver an exciting Heritage Lottery Funded Project (HLF).

The Staffordshire History Centre Project (SHC) will connect people to the collected stories and heritage of Staffordshire, Stoke on Trent, the Midlands and beyond. We will deliver a rejuvenated, accessible and sustainable Archives and Heritage Service by preserving collections and heritage buildings currently at risk and will develop new audiences for our heritage, both online and onsite. The transformed service will provide new opportunities to volunteer and engage with collections in different ways. We will achieve this by an Active Partnership with our committed stakeholders, where they are involved at the highest level in managing the service and making decisions. We will develop a major heritage attraction for Stafford and improve the public realm of the town, capitalising on recent changes that bring more people past our front door.

2. Background and Context

The aim of the Project is to create the Staffordshire History Centre and to:

- Develop our Active Partnership further to examine how we can work together on joint fundraising, income generation, support services, advisory panels, advice services and exhibitions.
- Preserve and repurpose the grade II* listed William Salt Library (WSL) building in Stafford. Develop the ground floor of the townhouse as an integral part of SHC under a new lease. WSLT will let upper floors as offices for start-ups, freelancers and the Cottage potentially as a residential letting.
- Improve storage of “at risk” collections. Extend archive storage at a redeveloped Staffordshire Record Office (SRO) to house collections from Lichfield Record Office (LRO) and WSL. Bring paper-based and digital Museum collections such as photographs, ephemera and oral history into SHC.
- Provide bright, welcoming, new spaces for activity by volunteers, schools and for audience engagement. Create exhibition areas, refreshment areas, a shop and browsing space for the service to provide an easy entry point for new users.
- Rejuvenate our online offer and deliver more services online.
- Capitalise on the significant changes and investment of £1 billion being made in Stafford Borough and town centre by creating a much needed new heritage asset to cater for the increased population.
- Create a new public route through the area which brings potential users directly past our new, open and welcoming front door.

Staffordshire Archives & Heritage (SAH) includes the Archive Service, jointly funded and managed by Staffordshire County Council (SCC) and Stoke on Trent City Council, and the County Museum Service funded and managed by SCC.

SAH is a respected, experienced and established organisation with a history of saving collections and innovation in access. It has developed this with the support of organisations including the Art Fund (Staffordshire Hoard, Minton Archive) and the HLF (Sutherland Papers, Staffordshire Appeals Project). SAH cares for around 11 million items across service points in Staffordshire and Stoke on Trent and online.

The main purpose of the SAH is to locate, collect and preserve archives relating to past and present life in Staffordshire and to make them available to the public. We manage three Record Offices (Stafford, Lichfield and Stoke on Trent), and a family and local history centre in Burton Library, and the County Museum.

The William Salt Library Trust (WSLT) was founded in 1872 to look after the collection of William Salt which focused on items about Staffordshire and its history. The object of the Charity is 'to advance the education of the public through the provision and maintenance for the purposes of study or research, of a collection of books, manuscripts, engravings, deeds, autographs and works of art relating in particular to the County of Staffordshire'. This collection is held in the WSL, Eastgate Street, Stafford immediately in front of Staffordshire Record Office (SRO).

SCC delivers the service and maintains the library building on behalf of WSLT.

3. Project Brief and Summary of Outputs

A consultant(s) is required to develop a Business Plan for the Staffordshire History Centre for a five year period.

The Staffordshire History Centre Project will include the Grade II* listed Georgian Townhouse and Victorian Cottage (18 and 19 Eastgate Street) which currently stores the William Salt Library collections. As part of this project the building will be repurposed with the ground floor becoming part of the History Centre and it is proposed that the Cottage and upper floors are converted for residential and business office space for start-ups. Some initial work has been carried out to identify opportunities for the re-use of the building and assess likely income to include with the Stage 1 HLF submission.

Business Plan

An experienced Business Plan consultant is required to create a detailed project Business Plan for the Staffordshire History Centre (SHC). Drawing on existing work to develop the project the consultant(s) will develop the plan for the Round 2 HLF application.

The consultant(s) will be required to:

- Review previous work carried out and test and challenge assumptions for the sustainability of the SHC, Townhouse and Cottage.

- Undertake a strategic review of the potential income streams, including office space, residential use, retail, venue hire and commercial activities.
- Undertake a demographic review / market analysis of visitor types and numbers with support from activity plan consultants.
- Assess commercial opportunities, analysing pilot events programme to determine appropriate business model for future programming.
- Carry out market research to test viability of income generation opportunities.
- Analyse capital and revenue costs relative to forecast income.
- Undertake a supply and demand analysis.
- Carry out a sensitivity analysis on the income / visitor figures to ensure the plan is robust.
- Work with the Project Board and Design team to test assumptions.
- Work with the Project Team and other consultants to ensure the Business Plan is in line with the Management and Maintenance Plan, Activity plan and Conservation and Management Plan.
- Ensure compliance with Funder's requirements.
- Identify risks and opportunities.
- Submit conclusions and financial sustainability of the Business Plan.
- Provide a complete project Business Plan in line with HLF's guidance at: <https://www.hlf.org.uk/project-business-plan-guidance>
- Provide information for the HLF Round 2 Application form especially section 6 by November 2017 in time for submission in February 2018.

Fundraising

In order to ensure the long-term sustainability of the Staffordshire History Centre beyond the HLF funded element of the project a robust funding strategy will be required. The Archives and Heritage Service has a good track record of securing external funding, but will need to be more ambitious in its fundraising activities and look at other areas of securing financial support. The matched funding target is £150,000 towards the project costs and must be in place by December 2017 to support the Round 2 application.

We require a consultant to develop a Fundraising Strategy, write grant funding applications and support our Friends groups to fundraise for the Staffordshire History Centre.

The consultant will:

- Develop a Fundraising Strategy and Plan for the Staffordshire History Centre project.
- Research potential fundraising opportunities and activities.
- Create the case for support to use in fundraising.
- Research and write joint funding bids with partner organisations.
- Engage and support relevant groups in fundraising activities, in particular Friends of Staffordshire and Stoke on Trent Archive Service (FoSSA), Friends of the William Salt Library (FWSL) and William Salt Library Trust (WSLT).

- Develop and submit bids to secure and maximise matched funding, from large and small grant-giving charitable trusts, and public sector bodies.
- Develop a sponsorship pack, to identify potential corporate or business sponsors and to bid for sponsorship.
- Research, collate and analyse data in order to identify new fundraising income streams and donor and volunteer profiles.
- Work with the Business Plan consultant to include fundraising income streams for the History Centre.
- Work with the County Council's Voluntary, Community and Social Enterprise Capacity Building Partner so that there is a legacy of learning and support to help ensure the sustainability of the SHC, Active Partnership and activity programme.
- Deliver matched funding of £150,000 by December 2017.

4. What is already in place

Business Plan

Some initial work has been carried out to identify opportunities for the re-use of the WSL building and assess likely income which was included with the Stage 1 HLF submission. This report looked at possible uses, potential rental income, ways of managing the building, and heads of term between the William Salt Library Trust and Staffordshire County Council for a new agreement in the future.

A condition survey was carried out on the William Salt Library building in January 2015. The final report assessed future maintenance costs for the building, accessibility, valuations for domestic and commercial use.

Fundraising

An assessment of potential sources of funding to raise some of the matched funding has been done and one Friends group is already actively fundraising. The Archive Service has a fundraising policy and strategy which was last reviewed in 2010.

5. Available documentation

- Stage 1 HLF application (excluding detailed costs)
- Report by William Salt Library Trust on the Future of the Trust
- Building condition survey for William Salt Library building

6. Project Partners and Management of Commission

Staffordshire County Council

Staffordshire and Stoke on Trent Archive Service
Staffordshire Record Office, Eastgate Street, Stafford, ST16 2LZ
Key Contact: Project Executive - Joanna Terry, Head of Archives & Heritage

Strategic Property Service, 2 Staffordshire Place, Tipping Street, ST16 2DH
Key Contact: Tina Nixon, Project Manager – Capital Programme

William Salt Library Trust
William Salt Library, Eastgate Street, Stafford, ST16 2LZ
Key Contact: Mithra Tonking, Chairman of the Trust

The commission will be managed by members of the Project Team as follows:

Joanna Terry, Head of Archives and Heritage
Matt Sutton Procurement Category Manager

7. Work Plan

We plan to start this contract in January 2017 and aiming to submit Round 2 HLF application in February 2018.

Budget

The maximum budget for this work is £18,000 to include all VAT, travel and expenses, venue and facilitation costs. Your application will be assessed on competitive price and value for money. The partners will endeavour to provide low cost or free meeting and workshop venues.

Payment will be made on receipt of invoices. The contracted party/parties will be responsible for paying their own tax and NI.

The full terms and conditions of the consultant's appointment will be in accordance with Staffordshire County Council's standard procurement procedures [attached].

Please note that, while not the only criteria, value for money is a key element of our evaluation criteria. You should provide an informed estimate of the cost of the proposed procurement. Submit all prices in pounds sterling and indicate VAT separately, if applicable. Quoted prices will be fixed and firm for the duration of the contract.

Contract duration and Milestones

Staffordshire County Council (SCC) will award the contract to the successful tenderer for the period January 2017 – November 2017.

The estimated milestones for the **Business Plan** to be submitted as part of this contract are:

- | | |
|-----------------------------------|---------------|
| • Project initiation | January 2017 |
| • First draft | April 2017 |
| • Second Draft | May 2017 |
| • Complete work | June 2017 |
| • Section for Round 2 application | November 2017 |

- Final bid February 2018

The estimated milestones for the **Fundraising** work to be submitted as part of this contract are:

- Project initiation January 2017
- Fundraising strategy March 2017
- Fundraising applications August 2017
- Complete work December 2017
- Section for Round 2 application November 2017
- Final bid February 2018

8. Process for submitting proposals

Tender response requirements

Business Plan

In responding to this tender, please include:

- Details of how you propose to meet all of our requirements and outputs listed above
- Your proposed project methodology
- Detailed project plan
- Clear and detailed budget for the project, including daily rates of staff employed
- Previous experience of providing similar services
- Detailed CV's for any staff members proposed with your tender
- Quality assurances procedures
- Skills and experience in:
 - Successful HLF Business Plan submissions
 - Working with archives or other heritage organisations to make their services more financially sustainable for the future
 - Carrying out market research to test viability of income generation opportunities
 - Assessing commercial opportunities.
 - Awareness of constraints that charities and local authorities work within
 - Innovative ideas for use of heritage buildings for commercial opportunities.

Fundraising

In responding to this tender, please include:

- Details of how you propose to meet all of our requirements and outputs listed above
- Your proposed project methodology
- Detailed project plan

- Clear and detailed budget for the project, including daily rates of staff employed
- Previous experience of providing similar services
- Detailed CV's for any staff members proposed with your tender
- Quality assurances procedures
- Skills and experience in:
 - Track record of successful fundraising applications
 - Effective fundraising strategy
 - Working with friends groups, charities to generate donations and fundraising campaigns
 - Innovative ideas for fundraising, use of new technology such as crowdfunding
 - Delivering to fundraising targets

Evaluation Criteria

Selection of the successful consultant will be carried out by assessment of their proposal followed up by the interview. All submissions will be measured against criteria listed below:

Business Plan

Criteria		Weighting
Value for money	Competitive price and ability to deliver value for money	30%
Quality	Success rate submitting successful Business Plans for similar projects. Evidence of viability after 3 – 5 years of delivery.	30%
Experience	Understanding of the archive and heritage sector, the project and its key deliverables, evidence of experience that is relevant to the listed requirements, comprehensive and relevant approach to the brief, implementation and capacity.	30%
Experience	Working with archives or other heritage organisations to make their services more financially sustainable for the future. Clarity of writing, including strength of narrative and avoidance of unnecessary jargon. Experience and track record delivering similar projects	10%

Fundraising

Criteria		Weighting
Value for money	Competitive price and ability to deliver value for	30%

	money	
Quality	Success rate submitting successful fundraising applications.	30%
Experience	Understanding of the archive and heritage sector, the project and its key deliverables, evidence of experience that is relevant to the listed requirements, comprehensive and relevant approach to the brief, implementation and capacity.	30%
Experience	Working with archives or other heritage organisations to deliver effective fundraising strategies. Clarity of writing, including strength of narrative and avoidance of unnecessary jargon. Experience and track record delivering similar projects	10%

All correspondence in relation to this tender, including tender submissions, should be made via the County Council e-tendering portal.

Tender Timetable

Please see below a detailed timetable of when specific events will take place and specific deadlines which must be met in order to participate in this tender.

Event	Date/Time
Tender Notice posted	w/c 21 November 2016
Tender response deadline	22 December 2016
Interviews (if applicable)	25 January 2017
Anticipated contract award	End of January 2017

9. Terms and conditions

The full terms and conditions of the consultant's appointment will be in accordance with Staffordshire shire County Council's standard procurement procedures [attached].

Compliance

We reserve the right to disqualify or reduce the evaluation score of any tenderers who do not fully comply with the requirements in the tender documentation, in

particular the closing time and date. We reserve the right to evaluate proposals on a variety of criteria. The tender with the lowest price will not automatically be accepted.

10. Tendering

If we need to amend any tender documents before the closing date, we will write to you with any changes. If we extend the deadline for tender responses, we will advise you.

SCC is not responsible, and will not pay for any expenses or losses you incur during, but not limited to, the tender preparation, site visits, post-tender negotiations or interviews.

Information and questions

If you need us to clarify the documentation or if you have further questions regarding the tender process, please contact us via the e-tender portal. We will respond to reasonable requests for further information within the timescale of the tender.

Return of Tender

All documents should be returned via the e-tender portal.

Post-tender interviews

SCC reserves the right to ask you to attend post-tender interviews or present your proposals. You are responsible for all your expenses when attending such interviews.

If required, interviews will take place on 25 January 2017 at Staffordshire Place 1, Stafford, ST16 2LP. SCC reserves the right to conduct post-tender negotiations with one or more tenderers.