



Introduction	<p>The Linlithgow Heritage Trust has recently been awarded grant funding from the National Lottery Heritage Fund to undertake a Sustainability Strategy Business Review. Project requirements are detailed in this document. The Trust invites expressions of interest from appropriately qualified consultants with heritage sector experience of similar projects and similar sized organisations.</p>
About us	<p>Linlithgow Museum is run by Linlithgow Heritage Trust (LHT), a volunteer-led charity. The purpose of the Trust is to collect and preserve artefacts relating to the former Royal Burgh of Linlithgow and to provide a museum to present these artefacts for the education and enjoyment of both local people and visitors. We deliver against several of the 8 West Lothian Council priorities, including providing destinations for school children and improving the quality of life for older people.</p> <p>The Museum moved to its current home in the Linlithgow Partnership Centre in April 2019. The museum is an Accredited Museum and has obtained a Five-Star attraction rating from Visit Scotland. It opens six days a week 50 weeks a year, featuring three galleries and a community space. The Museum attracted over 10,000 visitors in 2019/20.</p> <p>The Trust maintains permanent exhibitions relating to the history and culture of the town. The Community Space of the Museum is used to display temporary exhibitions which are rotated on a regular basis. Local people and organisations are encouraged to co-curate temporary exhibitions to commemorate specific events.</p> <p>The Trust also runs schools and activity programmes, including a regular talks series and biannual antiques fair. The Museum has been closed since March 2020 due to the COVID19 pandemic. A reopening date is not yet available pending public building reopening decisions by West Lothian Council.</p> <p>Entry to the Museum is currently free to visitors with donations encouraged and two cash donations boxes situated at key points in the Museum. The Trust has recently been awarded funding to implement digital donations boxes and these will be in place by the time the museum reopens. However, prior to COVID19 closure the average donation per visitor was just 50p per visitor.</p> <p>The museum has a largely fixed cost base with core property and operational costs grant funded. We have a current agreement with West Lothian Council to cover our rent and service charge in the Partnership Building; in addition, we are currently receipt of an annual revenue grant from WLC towards our operating costs. However, due to uncertainty caused by COVID19 and one-year budget arrangements in place between the Scottish Government and local authorities, the long-term security of this funding cannot be assumed. Other sources of funding include a small retail offering, the biannual antiques fair and a limited number of paid activities/events.</p> <p>Key decision-making takes place at Board level with monthly board meetings and interim operational meetings where necessary. All 12 board members are volunteers.</p> <p>The Trust currently has two members of staff:</p> <ul style="list-style-type: none">• One part-time (0.8 FTE) Communities Coordinator to develop the volunteering scheme and an engaging school learning programme linked to the Curriculum for Excellence. The Communities Coordinator is also responsibility for delivery of a project to digitise and monetise film archives held by the museum. This post is currently funded to February 2021 (part grant funding and part operational funding)• One part-time (0.4 FTE) Administrator to manage administration, financial records and banking. This position currently operates on a six-month renewable fixed term contract (operationally funded) <p>The remainder of day to day museum operations are undertaken by a team of 55</p>

	<p>volunteers. This also includes managing and maintaining the collection, and assisting with events and fund raising.</p> <p>There is currently no individual staff member appointed to have overall responsibility for Museum operations, manage and coordinate activities. This task is shared jointly between staff, volunteers and board members.</p> <p>Our website is www.linlithgowmuseum.org</p>
<p>The Project</p>	<p>We wish to explore a range of options to investigate how best to achieve financial independence, with several discrete pieces of work feeding into an overall Sustainability Strategy for the organisation. We also wish to achieve operational stability, with optimal division of staff, volunteer and board responsibilities that will support the museum and allow future development of activities. The project will be supported by board members as required.</p>
<p>Aims of the work</p>	<p>The aim of the project is to maximise income streams from the following sources.</p> <ul style="list-style-type: none"> • Retail: We have a small retail space within the Museum entrance area; we wish to maximise use of this space, help develop new lines, improve marketing and increase average visitor spend. Development and promotion of online sales is a key priority, as is collection digitisation with a view to being able to commercialise parts of it – e.g. downloads of digitised local topical films. • Events: We have a regular public lecture series, which runs a small profit and regularly sells out. We also organise a bi-annual antiques fair which runs at a moderate profit but is time consuming to deliver. • Membership: We have an existing ‘Friends of the Museum’ membership scheme, which has less than a hundred members and currently offers few tangible benefits. Options to relaunch and modernise this need to be examined. • Charging Model: We need to consider if the current Museum free to enter plus donations model is sustainable. We wish to research and test options, including but not limited to: <ul style="list-style-type: none"> a. Maintain current free model with increased donations b. Change to a paid entry model c. Look at hybrid paid/membership options d. Business sponsorship opportunities <p>Partnership working: As part of this project we intend to start to build formal partnerships and explore joint-working opportunities with other relevant local organisations, including Linlithgow Palace, St Michael’s Church, the Burgh Halls and the LUCS Canal Museum.</p> <p>Opportunities to be explored may include:</p> <ul style="list-style-type: none"> • joint ticketing/marketing of attractions to increase visitor time and spend locally, with associated economic benefits to the high street • possibility of joint staff members (e.g. education and outreach officer) shared between organisations to reduce overheads • sharing of results of local market research exercises (e.g. the output of this specific work) <p>All options must consider the current visitor demographics and ensure the Museum remains fully accessible to all. This requires a detailed local marketing survey to establish potential appropriate levels of ticketing charges etc.</p> <p>Any proposals will also need to include required staff/volunteer responsibilities in delivering each income stream, and the appropriate management and governance necessary for continued success. A recommendation would be welcome as to how the Museum’s various activities should be managed and coordinated.</p>

Key deliverables / outputs	<p>The Key deliverables of this project is the production of a completed Strategy Document to be presented at Board level to include;</p> <ul style="list-style-type: none"> • Museum Charging Policy Strategy • Retail Strategy to maximise income • Events Strategy to maximise income and community engagement • Membership Programme Recommendation, outlining member benefits and scheme costs/pricing • Identification of possible Partnership Opportunities • Identification of Employee/Volunteer Resourcing and Governance requirements to implement the strategy. • Any necessary market research to underpin the above strategic recommendations
Project timescales	The project should be completed within six months.
Project budget	The commission fee for this work is £10,000 to include VAT, travel and expenses. The budget could be split into discreet freelance contracts if specialist skills are required for any section of the project.
Monitoring, evaluation and reflection	<p>During this project a monthly board update will be required, either in writing or by attendance at the Trust Board Meeting as appropriate. This report should include an update of deliverables against a project plan to be agreed with the Chairman and Treasurer before commencement of the project.</p> <p>A written report will be required at the halfway stage in the project to assist in updating project funders.</p>
What we are looking for	We are seeking for an experienced consultant with good business acumen and a forward-looking approach to the heritage sector. The successful applicant will be able to communicate effectively with all museum stakeholders.
References	References will be requested after interview, but before signing contracts for this work.
Contact details	Please send responses by email to treasurer@linlithgowmuseum.org by the closing date below
Tendering process and timescales	<p>Proposals to this RFP should be received by 30th November 2020. Interviews will take place in early December by video conference (if required by COVID19 rules) or at the Museum if it is possible to access the building. Interviewees will be requested to outline their approach to the brief and demonstrate the appropriateness of the proposal to the museum.</p> <p>All applicants will be notified shortly after interviews have taken place.</p>
Instructions for responding to the tender	Responses by email to treasurer@linlithgowmuseum.org attaching the full proposal and a current CV showing relevant experience. A draft timeline of deliverables should also be submitted for evaluation.
Contract award criteria	Submissions will be evaluated based on the approach to the brief, value for money and demonstrated past experience.
Requirements	<p>The successful candidate will be appointed on a freelance/consultancy basis solely for the delivery of this project. The appointee will be responsible for their own tax and National Insurance.</p> <p>Remote working will be required on this project due to the COVID19 situation, but access to the Museum building and office will be available subject to any COVID19 requirements in force during this time.</p>