

**ORKNEY NATURAL HISTORY SOCIETY MUSEUM
(STROMNESS MUSEUM)
Stromness Museum Business and Marketing Plan
Preparation Tender**



1 BACKGROUND

Stromness Museum was established in 1837 by the Orkney Natural History Society, whose main purpose was the establishment of a museum. It exists to promote natural science, to preserve local history and to offer an enjoyable educational and informative experience to as large a range of people as possible.

The organisation's purposes are:

1. The advancement of education in local history.
2. The advancement of the heritage and culture of Orkney, in particular of Stromness and the ethnographic, natural and maritime history of the islands.
3. In furtherance of this we will establish and run a Museum in accordance with the Museum Association Code of Ethics 2015, as amended.

The museum is run by a board of thirteen volunteer charity Trustees, who are in charge of strategic planning. The museum became a SCIO in 2014 (SC021455). The museum currently employs three part-time permanent Custodians, two relief Custodians, a Cleaner and an Administrative post which is 3 hours per week. The Custodians are responsible for the front of house operations and the day to day running of the Museum. There are four Collections staff employed through project funding, due to end in March 2022. The Collections staff are part-time and consist of a Curator, Collections Manager and two Exhibition Assistants.

2 SCOPE

Stromness Museum currently has no Business Plan or Marketing Plan. From October 2021, the staff working at the museum are contracted for specific remits or work streams. These include:

- A small front of house team for opening the museum and running the shop.
- Professional staff consisting of Curator, Collections Manager and Exhibition Team, who are working on grant funded projects.

The Museum requires two distinct pieces of work completed to support our recovery from COVID restrictions these are:

- The development of a Business Recovery and Sustainability Plan – to support the business recovery.
- A Marketing Plan - to fully embrace the opportunities for development of the Museum.

2.1 BUSINESS RECOVERY PLAN

This should include an identification on how to sustain short-term recovery setting out a plan for developing engagement / footfall / income, including the development of a programme of year-round chargeable activities and events mainly focused on heritage themes, but aimed at broader audiences, including digital. It should also include plans for:

- Retention of Professional Museum Staff in the longer term.
- Development of a plan to resolve current museum constraints, such as the building, income levels, competition, disabled access, and other items as may be appropriate.
- Make a plan for the Museum to become sustainable in the medium to longer term.

2.1.1 Purpose of the Contract

The aim of this commission is to assist the Trustees of Orkney Natural History Society Museum in the development of the above project, specifically:

- To prepare a five-year Business Plan which incorporates initial revenue costs, capital costs to create the facilities, ongoing revenue and maintenance costs for the Museum, and risk analysis.

2.1.2 Outcomes

The content is likely to include:

- Review / refresh aims and objectives.
- General options appraisal.
- Options appraisal for building including:
 - potential use (including interim) of other spaces in Stromness.
 - funding options to address short-term issues, such as water ingress.
- Options to develop a significant capital project to address:

- current extremely poor disabled access and facilities.
- extend floorspace through an extension to accommodate the proposed activities and events and create more exhibition space.
- need for enhanced collection store / workspace.
- improved heating system, ideally utilising a heat pump system similar to that in use within the Stromness Library building.
- Organisational development plan.
 - Board development (skills, capacity, board processes, board sub-group development).
 - Financial management development including management accounts and projections.
 - Staffing plan including senior / project management.
 - Potential Refresh of policies and procedures.
- Collection management / collection development appraisal.
- Funding strategy including:
 - interim / capacity building / project development funds.
 - effective positioning for success with applications for grants from Museums Galleries Scotland, Historic Environment Scotland, Heritage Fund and Trusts and Foundations.
- Community support for forward plans (consultants to design and carry out independent survey).
- Five-year financial projections.
- Risks analysis outlining key risks and mitigation.

2.1.3 Additional relevant information to the commission

The following documents will be made available:

- Stromness Museum Feasibility Study in 2014.
- Extension Report by Leslie Burgher, Chartered Architect.
- Forward Plan.

This Business Recovery and Sustainability Plan is funded by Orkney Islands Council *Covid Recovery Development Fund* (50%) and Museums Galleries Scotland (50%). The timescale for completion will be 3 months.

2.1.4 Key Skills

The consultant/consultancy team will be required to demonstrate awareness and if possible, experience in the following:

- Museums or community project development.
- Visitor attraction project management experience.
- Experience of funders and requirements in terms of investment readiness ideally relating to Heritage Fund bids (Resilient Heritage and large two stage capital programmes).
- Preparing business plans to be used in support of funding applications.
- Financial modelling experience.
- Scenario planning experience.
- Board and general organisational development experience.
- Familiarity with Orkney would be an advantage. In particular the economy, culture and heritage of the local area.

2.2 MARKETING PLAN

Orkney Natural History Society Museum, locally known as Stromness Museum, is currently looking for a Marketing / Communications professional or company to review its current marketing and deliver a targeted Marketing Plan for the 2022 season and beyond.

There are nearly 200,000 visitors to Orkney (2019 Pre Covid) annually. Visitor numbers for Stromness Museum are on average 10,000 per annum. We wish to gain a larger market share within Orkney's crowded heritage tourism sector. To achieve this, we require to:

- develop new visitor markets,
- widen beyond the existing older 'history enthusiast' demographic to
 - younger, independent travellers,
 - interest groups,
 - young people in education,
 - business groups,
 - cruise ship parties,
 - researchers.

The marketing plan will draw on the Museum's collections as a resource to target new audiences interested in climate change and linking to renewable energy, marine biology / pollution and species extinctions.

Research will not only identify new markets, but will appraise how the Museum should or could embrace these markets in the light of increasing cruise ship and staycation visitors, changing visitor habits, and operational Covid-related restrictions.

2.2.1 Outcomes

- Deliver efficient and effective market campaign targeted at new and existing audiences, to maximise visitor numbers and sales.
- Liaise with Trustees, Curator and museum staff.
- Liaise with local organisations such as Visit Orkney, Destination Orkney, Stromness Development Trust, and Stromness Community Business Forum to ensure well-planned, collaborative marketing activity.
- Drive, co-ordinate and monitor digital, social and print marketing activities, ensuring a balanced distribution of work to ensure deadlines are achieved.
- Collaborate with museum staff team to develop campaign materials.
- Work closely with Trustees to ensure income targets are established, growth in audience diversity, and management of expenditure reports.
- Write effective, accurate and consistent material following a consistent tone and follows brand guidelines of Stromness Museum.
- Research and create a marketing plan, based on data gathered that will inform future marketing strategies.
- Post-pandemic review of museum market and audience trends.
- Analysis of visitor markets, local needs.
- Outline engagement, interpretation and activity plan.
- Partnership development plan.
- Volunteering and placement / work experience plan (all ages).
- Digital engagement and selling strategy.

2.2.2 Key Skills

- Experience working in a campaign-led marketing role.
- The ability to work collaboratively with internal and external partners, to create innovative marketing material.
- Experience of strategic digital marketing.

- Well versed in working with a CRM system. (?)
- An interest in heritage, museums and creative industries.
- A passion for working within communities.

2.3 MANAGEMENT AND OUTPUTS OF THE CONTRACTS

The successful applicants will have access to the Staff and Trustees of the Museum and a series of meetings will be agreed with the successful contractors as part of the kick-off meeting. The engagement could be undertaken in workshop format, with follow up meetings. Regular updates should be carried out to the Board and Professional Staff throughout the contract. Reporting can take the form of bullet points relating to progress achieved, however any slippage to planned timescales must be highlighted with corrective action outlined. The draft report should be presented to the full Board of Trustees and staff.

The commissions will be managed by Ian Johnstone (Chair) and the Trustees of Orkney Natural History Society Museum, and all outputs outlined below should be submitted to Ian Johnstone, as follows;

Outputs required are:

1. Business plan:

- A five-year business plan for the sustainable development of Stromness Museum.
- Two hard copies of the draft and final business plans will be required, as well as in electronic format.
- A summary of the Business Plan, less than two A4 pages in size, will be provided for the purpose of informing the public and members of the Orkney Natural History Society Museum.

2. Marketing plan

The information gathered during the commission, including draft and final reports, shall remain the sole property of Orkney Natural History Society Museum.

Remuneration and conditions:

- The work is offered as a fixed-term contract.
- The successful candidate will be responsible for his/her own tax and personal insurance.
- Payments will be made as follows:

- 50% on receipt and acceptance of draft BP, and the remainder upon acceptance of the final plan.

Procedures for tendering:

The response to this brief must be submitted by Monday at 5.00pm to Ian Johnstone telephone number: email **ianj770@gmail.com**.

Submissions should include:

- Name, contact details and background of consultant.
- Methodology for completion of the contract including tasks and milestones.
- Breakdown of costs for conducting this study, including number of days allocated per task, all fees, expenses, charges, meetings, presentations and interviews.
- A timetable showing the various milestones including the anticipated dates of submission of draft and final reports.
- Examples of similar tasks/studies undertaken recently.
- The skills and knowledge of the members of the team.
- Two names of contacts from two separate organisations for whom similar work has been undertaken, one to be within the past year.

If you wish to discuss this opportunity before tendering, please contact Ian Johnstone, Chair of the Board of Trustees (07831275246, **ianj770@gmail.com**).

Submissions will be evaluated on a quality/price basis (70:30) and will include the following:

- Understanding of the brief.
- Methodology and approach.
- Skills and experience of the team.
- Price.

Timeline

The anticipated timetable for the study is:

- Distribute brief to consultants 19/11/21
- Final date for tender submissions 03/12/21
- Appointment of consultant 10/12/21
- Inception meeting 16/12/21
- Submission of interim report 28/01/22
- Submission of final report 28/02/22

Details of actual timescales will be agreed with the selected Consultant before the Contract is issued.

Pricing

The project has a maximum budget of:

- £10,800 - Business plan
- £10,000 – Marketing plan

Both Inclusive of VAT.

The projects can be bid for as a whole or as two separate contracts.

Bid should be returned by email to Ian Johnstone (ianj770@gmail.com) by 5pm on 3rd December 2021.