

Brief for a Full Business Review of the Wordsworth Trust

Introduction

With funding awarded by the National Lottery Heritage Fund, the Wordsworth Trust is inviting tenders from suitably qualified individuals and organisations to undertake a full business review. At a time of unprecedented challenges, radical thinking is needed.

Background

The Wordsworth Trust was established in 1891 to provide a 'living memorial' to the Romantic poet William Wordsworth and his contemporaries at Dove Cottage, Grasmere. Preserving Wordsworth's famous Lake District home remains its main purpose.

Since 1891, the Wordsworth Trust has acquired most of the other historic properties in the hamlet around Dove Cottage (now a conservation area) and created a Designated collection of manuscripts, printed books and fine art that continues to grow. Wordsworth's verse manuscripts are at the heart of this collection, making it unique in Western literature: nowhere else does so much of a major writer's original work remain where it was written and inspired.

In 2005, with National Lottery support, the Wordsworth Trust created the Jerwood Centre to protect this collection and make it more accessible. In 2021, also with National Lottery support, it completed the Reimagining Wordsworth project, rebranding its site 'Wordsworth Grasmere' and broadening its appeal so that a more diverse range of people can discover Wordsworth's life-affirming poetry and its relevance in the 21st century. 'Superbly done – really uplifting and inspiring' is a typical recent comment.

The Wordsworth Trust's activities fulfil Wordsworth's own wish: that his poetry should 'live and do good.' They are inspired by a vision of a world in which Wordsworth can give anyone, anywhere, the opportunity for a richer life regardless of their background. They can be summarised as:

- a) Exhibitions that explore Wordsworthian themes through a range of perspectives. Recent co-curators include artists, academics, clients of homeless shelters, refugees, disability support groups, local history societies and other community organisations.
- b) A year-round programme of events, some of which are free and / or held online to remove barriers to participation. Events include talks by guest speakers, family creative play activities, and readings by contemporary poets that link past and present creativity.
- c) Activities for young people in formal education, from sensory tours for foundation-stage children to multi-day courses for undergraduates. A secondary school teacher recently described Wordsworth Grasmere as 'by far the best visit that we've brought the students on.' A primary school governor observing a classroom activity said, 'they don't know it yet but, for some, this will have been a life-changing experience.'
- d) Outreach, bringing Wordsworth into community settings throughout Cumbria (including Priority Places), much of it tailored to the needs of target beneficiaries, such as people with disabilities and their carers or residents of remote rural communities. Participants have described these activities as 'a lifeline.'

- e) General informal learning. Examples include creative activities for visitors to Wordsworth Grasmere, and after-school poetry-writing workshops led by professional poets in Kendal and Barrow-in-Furness.

Many of these activities are carried out with local, national and international partners, including the Wordsworth Trust's partners in the Cumbria Museum Consortium: Lakeland Arts and Tullie House. The Consortium has been funded by Arts Council England since it was launched in 2012, and last autumn further funding was secured until the end of the next National Portfolio round in March 2026.

Operating Context

Since Wordsworth Grasmere opened when Covid restrictions were lifted in May 2021, following the £6.5 million transformation achieved through the Reimagining Wordsworth project, visitor responses have been overwhelmingly positive. However, visitor numbers have not recovered to pre-pandemic levels, leading to a shortfall in admissions and trading income.

Visitor numbers in 2022/23 were c.25,500: 48% lower than 2017/18 (the Wordsworth Trust's last full year of trading prior to the start of the delivery phase of Reimagining Wordsworth) and 63% lower than the 68,250 visitors that were projected in the Reimagining Wordsworth business plan.

The most significant factor has been the collapse in overseas visitors, which usually represent a fifth of the Wordsworth Trust's overall visitor numbers. In December 2022, Cumbria Tourism reported that just 1% of visitors to the Lake District in 2022 were from overseas, down from 15% in 2019. At the same time, the domestic visitor market has been affected by cost-of-living pressures: all the UK's major conurbations are over 2 hours' travel time from Wordsworth Grasmere, so the Wordsworth Trust's remote rural location makes it highly susceptible to inflation in fuel prices and squeezed household budgets. As a predominantly indoor attraction, it has also suffered from Covid hesitancy at a time when the Lake District's outdoor attractions have tended to fare better. The unpredictability of visitor behaviour makes it difficult to plan, or to carry out effective marketing.

The Wordsworth Trust was able to sustain itself during the pandemic years of 2020/21 and 2021/22 by accessing various support programmes including the Culture Recovery Fund, the Coronavirus Job Retention Scheme, business rates relief and emergency grants from charitable trusts. With none of these options now available, the Wordsworth Trust is now having to rely on its free reserves. It needs to devise a resilience plan to safeguard the investment that has been made in the Reimagining Wordsworth project and make the organisation more financially sustainable.

We have already taken a number of steps to address our situation:

- Undertaken R&D into new product development
- Commissioned a review of our most energy-intensive building (the Jerwood Centre) with a view to improving its energy efficiency
- Identified cost savings to achieve short-term financial sustainability, including the freezing of posts

- Devised a fundraising appeal linked to an annual fund, to increase donations income
- Reviewed the staffing structure for the visitor attraction to ensure that it is the most efficient and cost effective possible based on our current offer
- Begun work on a property improvement plan, with a view to increasing income

The Brief

Overall Aim

As a result of this business review, the Wordsworth Trust will have a roadmap to a more secure future and will be better able to use its heritage assets to enrich people's lives through Wordsworth's poetry.

Outcomes

The review will achieve the following outcomes for the Wordsworth Trust:

- Ensure that it is fit for purpose and defined that purpose
- Establish the most effective use of its assets in order to achieve that purpose and meet the needs of its stakeholders
- Establish an effective organisational structure
- Acquire a better and deeper understanding of the current and future operating context
- Identify a pathway to financial sustainability

This project also has the potential to provide alternative operating models for other heritage organisations and to act as a case study for the sector as a whole.

Outputs

The consultant will be required to produce a written report containing the following:

- Detailed analysis of current and future operating context
- Proposed operating model and organisational structure
- Recommended areas of focus, covering:
 - Programming
 - Commercial development
 - Asset management
- Workforce training/professional development plan to address skills-development needs identified as part of the project
- Annual profit-and-loss forecasts for the five full financial years following completion of the review
- Key performance indicators, incorporated into a data dashboard

The report will frame the above as a series of short, medium and long-term recommendations, with a detailed action plan for each recommendation, including rationale, timescale and responsibility/resources required.

The report will be the copyright of the Wordsworth Trust.

The consultant will be required to lead two workshops in change management and implementation for Trustees and staff at different stages of the project (see page 5).

Areas to be covered

We would expect the Business Review to address (but not be limited to) the following areas:

Operating Context

Since it embarked on its Reimagining Wordsworth project in 2016, a combination of Covid-19 and an economic downturn has changed dramatically the world in which the Wordsworth Trust operates. A number of surveys and reports have been commissioned in the cultural/heritage sector since 2020, but there is still a great deal of uncertainty about the current and future operating context. This is further compounded by the worsening geopolitical situation and its impact on international visitor markets. Clearly there have been changes in visitor behaviour. Are these changes temporary or permanent?

Underlying global trends - principally the climate emergency and the march of digital - have added to the uncertainty. These trends have already changed the way in which heritage organisations operate. How much further, and in what ways, will they have to change in the future?

Purpose and Activities

The Wordsworth Trust's charitable objects have remained unchanged since its foundation in 1891. Are they still relevant? Underpinning these objects are a set of values, established during the recent brand review. Are they appropriate (for the next 5 years)?

Can the Wordsworth Trust reconcile its multi-faceted educational mission with the need to operate a commercial visitor attraction? Should it look to develop more commercial programming around, for example, exhibitions?

Operating Model

If the Wordsworth Trust is to continue to function as a multifaceted organisation, how does it structure and resource its various functions in the most efficient and effective way? In answering this question, we don't wish the consultant to limit their thinking to existing models within the cultural/heritage sector.

The Wordsworth Trust has a trading subsidiary, Dove Cottage Promotions Ltd (DCP), which operates its Shop and Café. Does DCP have the appropriate structure and remit? Should it expand to encompass other areas of commercial strategy, for example, property management, licensing, programme and product development?

To reduce its reliance on a single income stream, the Wordsworth Trust has, over the years, diversified its funding model (a mix of earned and contributed, public and private sector income). Is this model too diverse? Are there specific funding streams on which it should focus going forward?

As mentioned above, the Wordsworth Trust is part of a consortium of museums funded by Arts Council England. The review should explore the synergies between the three members of the Cumbria Museum Consortium and their potential for more effective working.

Function

As noted above, the Wordsworth Trust is a multifaceted organisation catering for the needs of a range of stakeholders. Is it trying to be too many things to too many people? What areas of work should it prioritise over the next five years? What can the Wordsworth Trust do differently, for example by looking outside the cultural sector?

Staffing

A high percentage of the Wordsworth Trust's turnover is spent on salaries (despite the fact that the museums sector as a whole is not well remunerated). Is there scope to make our staffing structure more efficient and effective? If not, what changes in structure, remuneration and working practices need to be made?

Skills Development

Crucial to the success of the organisational review will be managing Trustees and staff through a process of change. At an early stage in the project, the consultant will be expected to work with trustees and management staff on change management, providing them with the skills to navigate themselves and their teams through this process, and identifying the resources/training required. A further planning workshop for Trustees and senior staff, focused on implementing recommendations, will be delivered towards the end of the project. The consultant will be asked to propose a means of evaluating the two workshops.

Asset Management

Relatively speaking, the Wordsworth Trust is asset rich. In addition to its internationally recognised collection of manuscripts, books, fine art and personalia, and a (relatively modest) endowment, it manages a substantial portfolio of properties on its site. Could the Wordsworth Trust make more effective use of its properties?

Reimagining Wordsworth

Reimagining Wordsworth was designed to broaden the Wordsworth Trust's appeal and ensure its financial sustainability. This review should test the assumptions on which Reimagining Wordsworth was based, namely:

- Wordsworth is our primary asset and his poetry is still relevant to people's lives.
- We should focus on William and Dorothy Wordsworth and not the wider Romantic movement.
- It is necessary to the visitor offer to operate a museum in addition to an historic house.
- We can attract new audiences (e.g., families) whilst retaining our existing audience.
- People will pay more for the Wordsworth Grasmere experience because we have created a destination, not just a visitor attraction.
- Temporary exhibitions are not a major driver of visitors to Wordsworth Grasmere, therefore space in the Museum is dedicated mainly to permanent exhibitions.

Market Appraisal

The Business Plan for Reimagining Wordsworth (updated in 2021) contained a detailed market appraisal. Recognising that customer motivations and behaviour have changed following the pandemic, the consultant should undertake a fresh market appraisal to identify key target audiences for Wordsworth Grasmere.

The consultant should also undertake a benchmarking exercise to understand where the Wordsworth Trust sits against a range of comparators/competitors, including:

- Attractions in the Lake District
- Other museums
- Other cultural organisations

Financial Appraisal

The Business Plan for Reimagining Wordsworth (updated in 2021) also contained a detailed 5-year financial forecast. Recognising that the economic climate has changed since then, the consultant should undertake a fresh financial appraisal (informed by the market appraisal) and create a revised and updated 5-year financial forecast. They should also undertake a profitability assessment of each of the Wordsworth Trust's income streams.

Methodology

We want the consultant to think as freely as possible in terms of methodology, but would anticipate that it will include a combination of the following:

- Meetings (in-person and online) with individual Trustees (Chair, Vice Chair and Treasurer) and members of the senior management team
- Workshop with Trustees
- Workshop with management team and other staff
- Individual consultation with key stakeholders
- Desk-based research
- Meetings/telephone interviews with comparator organisations
- Meetings/telephone interviews/focus groups with stakeholders (see below)
- Presentations to Trustees and members of the senior management team

Stakeholder Engagement

We want to ensure that we shape our future operating model around the needs and aspirations of our stakeholders. We will expect the consultant to undertake a range of consultations with key stakeholders, including:

- Visitors to Wordsworth Grasmere
- Community Panel
- Delivery partners and service users in communities within and outside Cumbria
- Statutory bodies and strategic partners, including Arts Council England, Cumbria LEP, Westmorland and Furness Council and Cumbria Tourism
- Higher Education partners
- A representative sample of individual supporters
- A representative sample of funding bodies

General Information for Tenderers

Skills and Experience Required

The consultant will have expertise and experience in the following:

- Writing business reviews and business plans for the heritage, cultural and/or commercial sectors
- Research and data analysis
- Financial analysis and planning
- Organisational structures and operating models
- Change management and skills development
- Commercial development and asset management

- Excellent communication skills, both written and oral

The Wordsworth Trust recognises the complexity of this brief, and it is happy to receive consortium bids.

Selection process

Written applications will be assessed against the following key criteria:

- Track record and experience of working with organisations in the cultural sector.
- Access to relevant sector intelligence, including benchmarks.
- Response to the specific requirements of the brief.
- Proposed methodology.
- Capacity, including back-up provision in the event of illness or other circumstances.
- Proposed budget.

The quality–price ratio for scoring will be 65:35.

Budget

Please include a detailed budget for the work, including a breakdown of your fees and an allocation of time for each member of your proposed team. Your quotation should be inclusive of VAT and all expenses. Please show your expenses separately to your fees.

The guide price for this contract is £60,000 including VAT.

Submitting your proposal

Please submit your proposal by **8.00am on Monday 2 January 2024**.

Your proposal should be no longer than eight pages of A4. Please address your proposal to the Director of the Wordsworth Trust and submit it by email to m.mcgregor@wordsworth.org.uk.

Timetable

Shortlisted bidders will be invited to an interview to take place at Wordsworth Grasmere on either **Monday 22 January** or **Tuesday 23 January 2024**.

We expect work to begin no later than the week beginning **Monday 12 February 2024**.

A final report for should be available for Trustee approval by **Monday 30 September 2024**.

Our deadline for overall completion of this project is the week ending **Friday 25 October 2024**.

Environmental Responsibility

The Wordsworth Trust is committed to a greener planet and we wish to ensure that this project is delivered in a way that minimises environmental impacts. Please include with your tender submission details of your approach to environmental responsibility and the ways in which you will seek to minimise the environmental impact of this project.

Expectations

The Wordsworth Trust receives funding from public sources to carry out its activities. It adheres to the UK Government's code of conduct for grant recipients, and it expects its contractors and agents to do the same. In particular, it expects contractors and agents to:

- observe any obligations under the Data Protection Act 2018 that arise in connection with their contract with the Wordsworth Trust.
- comply with the Human Rights Act 1998, the Equality Act 2010, and other relevant statutory codes of practice in relation to equalities legislation and the prevention of discrimination in the workplace.
- be aware of their responsibilities under the Safeguarding Vulnerable Groups Act 2006, and to have in place safeguarding policies and procedures that are appropriate to their business activity.
- comply with the Modern Slavery Act 2015 and any other applicable anti-slavery and human trafficking regulations and codes.
- be trained to recognise a person's vulnerability to being drawn into terrorism, and to be aware of available programmes to deal with extremist activity and radicalisation, including the Terrorism Prevent Programme.
- disclose any personal links between their organisation and the Wordsworth Trust through family or close friendships at the point of bidding for contracts or the supply of services.
- notify the Wordsworth Trust if they are ineligible, or become ineligible, for participation in government procurement programmes or contracts, including by being listed as debarred, suspended, or proposed for suspension or debarment, by any government department or agency.