



Crofton Beam Engines
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A branch of The Kennet and Avon Canal Trust
Registered Charity No. 209206

Consultancy brief: Crofton 2030

Overview of project

Crofton Beam Engines is a Grade I listed site, home to the oldest beam engine in the world still in its original location and still capable of carrying out the job for which it was built over 200 years ago – pumping water to the summit level of the Kennet and Avon Canal. It is owned by The Kennet and Avon Canal Trust (KACT), a charitable company limited by guarantee.

Crofton currently operates at a financial loss, and is supported from KACT reserves. We have been awarded a grant by the National Lottery Heritage Fund to carry out a resilience project– ‘Crofton 2030’ – whose overall aim is to develop a robust and deliverable strategy for Crofton to be a premier heritage attraction by 2030, worthy of its Grade I listed status.

The project has four main Approved Purposes:

- Assess the site’s current operations, financial position and visitor offer, leading to the development of a Site Master Plan.
- Review engagement and ‘value added’ activities at other heritage sites.
- Develop a Business Plan for the next 3 years.
- Conduct market research to identify new audiences.

The project will identify both initiatives that can be adopted quickly, with existing facilities and resources, and also those which offer significant benefits in the medium term but which would require further investment in facilities. The final output will be a medium term business strategy for Crofton to 2030 and a more detailed business plan for the next three years.

We will carry out most of the work on developing the Site Master Plan in-house, but wish to engage consultants for the other three elements.

The project is being managed through a Project Group of Crofton volunteers and KACT Trustees.

External support requested

We are inviting tenders for consultancy support for three assignments:

Assignment 1: Market review;

Assignment 2: Market research; and

Assignment 3: Development of business strategy and forward plan.

Tenders for each assignment will be considered separately. However, you may submit a proposal covering more than one of these areas, but in that case you should indicate whether you are willing to be considered for individual assignments or only for the combination included in your proposal.

We welcome tenders from individual consultants, as well as from groupings if you consider that this will benefit delivery of the project.

Methodology and outputs

The expected broad approach to each assignment is set out below. However, your proposal should set out in more detail how you would approach the task in order to deliver the required outputs.

All three assignments will involve regular reporting to the Project Manager and feedback to the Project Group at appropriate intervals, as well as a presentation of final results and recommendations. At our discretion, we may wish to invite the selected contractors for later assignments to the presentation of results from earlier stages.

Assignment 1: Market review

The aim of this assignment is to identify approaches to engagement in similar heritage attractions, in particular those which have succeeded in generating increased income either directly through charges or sales, indirectly through encouraging additional visits, or through other value-added activities. The study is likely to involve a high level review of a long list of sites, against a checklist covering both the type of activity and charging, and a more detailed review of a shorter list. The second stage is likely to involve direct discussion with the selected sites, and will probably benefit from site visits.

Although the Project Group can provide a list of similar heritage attractions, it will be for the selected consultant to determine the long and short listed sites to be included in the study, although you should agree the shortlist of sites subject to detailed review with the Project Group.

You will need to understand the current visitor and group offer at Crofton, the current mix of visitors and other users of the site, and the medium and longer term plans for developing the facilities at Crofton, as a basis for selecting relevant sites. We will provide an analysis of Crofton's current visitor and engagement offer as an input to this.

The output of this assignment will be a report summarising the results of both the longlist and shortlist research, with recommendations about initiatives which are worthy of further consideration by Crofton. In making those recommendations, you should identify what skills and facilities would be needed to deliver the initiative. The report should also identify initiatives which are likely to broaden the range of people engaging with Crofton, rather than simply increasing visitor numbers, and indicate how this has been achieved at other sites (for example through partnership with other organisations).

You will complete this assignment by making a presentation of results and recommendations to the Project Group.

Assignment 2: Market research

The aim of this second assignment is to test the demand for this long list of initiatives, taking account of the location and nature of the Crofton site, and make recommendations about a short list to be included in Crofton's future strategy. It will be based on the list of initiatives identified in Assignment 1; the final list of those to be tested in assignment 2 will be agreed between the Project Group and the contractor for this assignment.

The questions to be addressed include:

- Whether there is sufficient demand for the initiative to make it worth pursuing;
- If so, what specific requirements potential users might have in order for the initiative to be successful;

- The potential scale of the demand, and the marketing required to reach target audiences; and
- What resources and facilities Crofton would need to provide to meet those requirements.

In putting forward a proposal for this assignment, you should give as full an indication as possible of the approach you will adopt, within the limits of the overall project, to be able to give specific recommendations about initiatives which Crofton could deliver quickly, no later than Easter 2024, and those which would increase the number and range of people engaging with Crofton but which require additional skills to be developed or facilities provided.

The market research should in particular test the likely benefits of current Crofton plans for developing a museum on the site and providing a dedicated learning and event space.

You will complete this assignment by making a presentation of results and recommendations to the Project Group.

Assignment 3: Business strategy and forward plan

The aim of assignment 3 is to develop the current Crofton Business Plan into a robust strategy for the period to 2030, and a more detailed forward plan for the next three years. In doing this, you will critically review the current forward plan and projections. You will start from the resources and facilities currently available and identify:

- The likely costs and revenues of continuing the current offer;
- The additional costs and revenues from adopting the shortlisted initiatives emerging from assignment 2;
- Where this involves capital expenditure, the potential for grant funding or other targeted fundraising;
- Where additional skills are required, the most appropriate and achievable ways of obtaining those skills (for example through employing additional staff or seeking additional volunteers);
- Whether the proposed strategy is likely to deliver financial sustainability and, if not, what alternatives (if any) might achieve that objective;
- How the plan addresses the four investment principles in the new NLHF 10 year strategy; and
- The risks to delivery, and appropriate mitigations.

You will work closely with the Project Group in delivering this assignment, both to understand the basis of the current plans and to ensure that there are robust and deliverable plans in place to broaden and deepen audiences, increase earned income and improve resilience and sustainability. You in particular will indicate whether you consider the objective of achieving financial break-even is achievable, and the likely timing.

You will present the strategy and forward plan resulting from this assignment in person at Crofton to the Branch Committee and selected Trustees. We will expect to use the strategy and plan as the basis for finalising the Site Master Plan and for future fundraising and grant applications.

Contract management

We have received Permission to Start the project from NLHF.

Our current expectation is that the dates for the three assignments will be:

- Assignment 1 – mid-April to mid-May;
- Assignment 2 – mid-May to early July;
- Assignment 3 – early June to late August.

The anticipated budget for the project is £32K including VAT. Allowing for evaluation and contingency, we would expect the VAT exclusive budget to be split roughly as follows:

- Assignment 1 - £4K
- Assignment 2 - £10K
- Assignment 3 - £8K.

The project will be managed on a day to day basis by Chris Bolt, KACT Treasurer and Trustee and chairman of the Project Group.

Procurement process

Your proposal for undertaking the work should include:

1. The assignment or assignments for which you are bidding, and in the case of bids for more than one assignment an indication of whether you are willing to be considered for individual assignments or only for the combination included in your proposal.
2. A detailed methodology for undertaking the assignment.
3. Details of both the lead person who will carry out the project and of any others who will be involved in it, together with relevant experience in carrying out similar projects.
4. The expected number of days required to complete the assignment and, where relevant, the allocation of days between members of the team, with an indication of any restrictions on availability.
5. The daily charging rate of individual team members involved.
6. A timescale for carrying out the project
7. An overall cost for the work.

Your proposal should include a firm price for each assignment for which you are submitting a bid, including expenses, but with VAT (where charged) identified separately. You should also set out a proposed payment schedule.

If you wish to discuss any issues before submitting a proposal, you should approach the Project Manager by email in the first place (pm@katrust.org.uk).

Proposals should be returned by 1700 on Friday 31 March. These should be sent by email to the Project Manager (pm@katrust.org.uk).

Following receipt of proposals, we will hold interviews with shortlisted contractors, no later than 14 April. These will take place in person at Crofton, but could be by Zoom if travel on the selected date is impossible. We will evaluate bids on the basis of your understanding of the issues, the extent to which the methodology and methods you propose are appropriate to the requirements set out in this brief, the experience of those who will carry out the work, and the overall price proposed.

If your proposal is accepted, we will discuss with you the contract documentation and mobilisation arrangements. Contracts will be let by The Kennet and Avon Canal Trust. We will offer feedback to unsuccessful bidders.

11 March 2023