



STRATEGIC REVIEW CONSULTANCY BRIEF

<i>Task:</i>	<i>Strategic Review and Forward Plan Consultancy</i>
<i>Contract:</i>	<i>To deliver a Strategic Review and Forward Plan for the Restoration Trust</i>
<i>Reports to:</i>	<i>The Project Steering Group</i>
<i>Timescale:</i>	<i>January 2025 – December 2025</i>
<i>Fee:</i>	<i>£29,750 + VAT plus expenses up to £1,500</i>

Commission

The Restoration Trust wishes to commission a consultancy firm or an individual consultant to undertake a strategic review, develop options and create a forward action plan based on the agreed preferred option. This is funded by The National Lottery Heritage Fund.

We are looking for a Consultant who has a particular interest in the field of cross-sectoral initiatives in heritage/culture, health and wellbeing, and has experience of undertaking strategic reviews and organisational development. The Consultant should have in-depth experience of the charitable sector and its funding routes.

The Restoration Trust

The Restoration Trust (RT) www.restorationtrust.org.uk is a charity which enables the heritage sector to engage with people who live with mental health challenges and are under-served by heritage. The RT is at a crossroads as its founder Director Laura Drysdale has retired, having spent ten years successfully establishing this innovative charity. Through funding from the Heritage Fund, we wish to appoint consultant/s to undertake a strategic review and forward plan to steer us through the next ten years. This is the key element in our project: Building a Sustainable Restoration Trust.

The role of the Strategic Review Consultant

We envisage the work will include the following, although consultants will wish to add their own ideas.

1. Research

- Review current projects, taking into consideration their specific forward plans.
- Review our project evaluations: what we do well/our unique contribution.
- Horizon scanning of the heritage sector context, particularly relating to inclusivity.



- Horizon scanning of the health context, including NHS plans, Voluntary Community and Social Enterprise (VCSE) involvement in Integrated Care, prevention, social prescribing, parity between mental and physical health.
- Discussion with Board of trustees about future project ideas/ways forward/existing thinking
- about strategic options.
- Research funding opportunities to provide a core team to lead the next ten years.

2. Consultation

Facilitation of three Round Table events:

- 1. Heritage and place. A Norfolk-based half-day in-person workshop hosted at Gressenhall Environmental Hub sponsored by Norfolk Museums Service, involving heritage providers, community partners, Restoration Trust participants. Focused on the benefits of increasing people's connection with their local heritage. Investigating the potential of greater inclusivity in heritage-based investment linked to place (for example in Great Yarmouth) and more widely. How could/should this be scaled up by RT in other areas within and outside Norfolk?
- 2. Heritage and Creative Health. A half-day online workshop co-hosted with the Culture Health and Wellbeing Alliance and the Baring Foundation, focusing on inclusion and diversity. Exploring the scope to increase the voice of heritage in creative health and for heritage to benefit from the experience of arts and health. What can/should RTs role be in this?
- 3. Heritage and mental health at national level. An online Round Table co-hosted with the Wellbeing and Heritage Working Group led by Historic England and the Council for British Archaeology to engage with key national heritage organisations, to explore the Restoration Trust's contribution to embedding good practice in the heritage sector and to ask: What is the scope for working together going forward/RTs role

Individual interviews with key stakeholders/partners/funders to follow up on any specific issues in more depth arising from these consultations

3. Options Development

The consultant/s will describe 4 to 5 strategic options for a practicable, realistic way forward for the Restoration Trust.



4. Strategy event

The consultant/s will bring the options they have developed to a two-day strategy event with the Board of Trustees and external members of the Steering Group.

- Day 1 will focus on the options and their detailed appraisal reaching a consensus for the preferred option.
- Day 2 will focus on practical planning for the way forward based on the selected option.

5. Strategic Forward Plan written up

The consultant/s will prepare a written Forward Strategy and detailed Action Plan to present to the Trustees. This must include the proposed strategy, the appropriate organisational structure and core funding source/s.

Reporting

The consultant/s will report to the Project Steering Group. This group will comprise trustees, people with lived experience, representatives from heritage professional partner organisations. It will meet eight times over the course of the work, with most of these meetings taking place online. The consultant/s will provide a verbal update at each meeting with a circa six-month short written report on progress and initial findings followed by the options paper (around nine months) and then the final report with forward plan (around eleven months).

Additional information

- Invoices to be issued on a staged payment basis of 30%, 30% and 40%. Payment terms will be 30 days from receipt of invoice.
- The contract will take place at the consultant's own base. Support in terms of key contacts/calendar dates will be provided by the Project Manager.

Tender requirements

If you are interested in bidding for this work, please submit a maximum ten-page proposal setting out how you will undertake it, your experience that qualifies you to do it, a work plan and detailed timetable and your proposed budget for each element of the work (using the template provided here). Tenders should be submitted by December 18th 2024.

Further information

If you would like to discuss this brief in more detail with our Project Manager Darren France