



Strategic Planning Consultant

1. Background

1.1. The Jenner Trust

“No human being who has ever lived has saved more lives in history than the simple country doctor from Gloucestershire.” (Andrew Marr)

The Jenner Trust owns and cares for The Chantry, the former home of vaccine pioneer Edward Jenner. This is where, in 1796, Jenner first demonstrated that the minor disease cowpox could protect against the feared virus smallpox, and where he dedicated his life to telling the world how to vaccinate safely and effectively. Less than 200 years later smallpox was declared eradicated; the first and only human disease to have been wiped out. Jenner's legacy, the ongoing practice of vaccination against other diseases, saves an estimated three to four million lives every year.

This is truly unique heritage; The Chantry and the town of Berkeley were not just Jenner's home, but also his laboratory. Open as a museum since 1985, people travel from all over the world to see Jenner's home. More than this, however, we also have a local mission recognising, through their role as subjects for Jenner's early vaccinations, the contribution that the people of Berkeley made to this world-changing discovery. As such, we undertake a significant amount of work in the local community, helping them to engage with their own history but also providing a community venue, services and activities.

We currently do all of this with limited financial resources and a small, but dedicated, team comprising a full-time Museum Manager, two part-time Visitor Experience Assistants (both 0.3 FTE), a part-time Finance Assistant (0.1 FTE) and cleaner (0.3 FTE) and 25 volunteers carrying out roles including gardening, collections care, education support and visitor services. The governing body comprises eight Trustees from a wide range of backgrounds, including medical science, building conservation and museums.

1.2. “Safeguarding the future of the birthplace of vaccination” project

Since 2014, The Jenner Trust has sought to renew its governance and strategy in order to respond to falling visitor numbers and a significant annual deficit. In 2014 the Trust transitioned to Charitable Incorporated Organisation status and although there have been many successes in the intervening years, the museum has continued to operate at a loss. In September 2018 reserves were so low that a successful appeal was launched to secure £20,000 in unrestricted donations and save the museum from closure. Alongside the appeal the Trust has made key appointments to its Board, increasing its diversity and broadening its skill base.

Supported by The National Lottery Heritage Fund, we are now seeking to capitalise on the momentum of this campaign and secure our future by developing a robust strategic plan to deliver a long-term future for a site that so many people locally and around the world hold dear. Specifically, we intend to:

- Diversify our income streams and make us less reliant on charitable giving and project-specific funding;
- Build a successful business whilst also maintaining our core identity;
- Make full use of our assets and resources;
- Re-engage with our community and stakeholders internationally and form new working partnerships;
- Develop our own skills to maintain our resilience going forwards.

The project is intended to complement other projects that the Trust is currently seeking funding for, including a recent grant application to fund a consultant to create a fundraising strategy and prospectus.

2. Strategic planning consultant

At the centre of this project, we are looking to appoint an experienced strategic planning consultant to act as an independent guide and help bring clarity of purpose to a Board with a diverse range of options and opinions regarding the Trust's strategy.

We intend for the consultant to work across three sequential work packages, as follows:

- A situational analysis, to include an overview of consultancy reports previously commissioned but not yet followed up;
- Board, volunteer, community and stakeholder consultation to inform strategic plan development;
- Creation of a co-developed long-term strategic plan, to include identification of key targets and milestones to shape the Trust's day to day operations.

3. Process, outcomes and milestones

The strategic planning consultant would be expected to provide regular written reports to a sub-committee of The Jenner Trust, along with an initial in-person briefing and a final in-person presentation. The Museum Manager will be the day to day contact for the consultant.

The situational analysis and community and stakeholder consultation will inform the creation of a long-term strategic plan, which will be the main outcome of the project. As such, our preference would be for a single consultant to act throughout the project, however we are happy to consider applications from agencies or teams.

The strategic plan should inform our work from April 2020 onwards and will be reviewed at a meeting of The Jenner Trust in early March 2020.

We anticipate that the strategic planning consultant would be appointed in May 2019 with a work plan being agreed between the consultant and the project sub-committee to cover the period May 2019 to March 2020.

Evaluation of the project's methodology will be carried out independently and a separate brief is available for this task. We anticipate that the strategic planning consultant will need to refer to the evaluation consultant from time to time throughout the project.

4. Relevant experience

We require the strategic planning consultant to have experience in the following areas:

- Forward planning and strategic development in the museums or heritage sector;

- Working with primarily volunteer-led organisations;
- Working with organisations with an annual turnover of less than £100,000;
- Diversification of income streams;
- Coaching and support of charity Boards;
- Community and stakeholder consultation.

Understanding of and prior work with personality-based museums would be useful, although not essential.

Public transport is very limited in Berkeley and we would advise you to consider your travel arrangements in advance of submitting any proposal.

5. Fees

We recognise that this is a substantial body of work and therefore have a budget for project consultancy fees of £20,000-£25,000, inclusive of VAT and expenses.

This will be paid as follows:

- 20% on signature of contract for work;
- 40% on completion of community and stakeholder consultation activities;
- 40% on completion and agreement of strategic plan.

6. Selection criteria

If you would like to be considered for this project, please submit the following:

- A copy of your CV and CVs for any associates who will be involved in the project;
- Your methodology for carrying out both the community and stakeholder consultation and the co-development of a strategic plan (maximum of 2,000 words);
- An example or case study of similar work previously carried out by yourself (maximum of 1,000 words);
- Your budget for the project;
- Contact details for two referees.

Assessment of submissions will be made on the following basis:

- 50%: approach to project;
- 40%: relevant skills and experience;
- 10%: costs and value for money.

Completed submissions should be made by email to Owen Gower, Museum Manager on events@edwardjenner.co.uk.

Submissions must be received by 12 noon on Friday 24 May 2019.

Interviews will be held in Berkeley, Gloucestershire in early June. No travel expenses are available to cover interview costs.

For further information or for an informal discussion, please contact Owen Gower using the above email address in the first instance.