Introduction: World Heritage UK

World Heritage UK (WH:UK) is a Charitable Incorporated Organisation established in 2015 which undertakes networking, advocacy and promotion on behalf of all of the UK’s World Heritage and Tentative World Heritage Sites. We work across England, Scotland, Wales and Northern Ireland.

Our Vision: is that the United Kingdom will have a coherent approach to its World Heritage Sites (WHS), which will be better known, understood, and supported through sustainable funding so that their Outstanding Universal Values can provide inspiration, learning and enjoyment for society.

Our Mission: is to raise the profile and secure the future of UK World Heritage Sites by advocating for support and resources, promoting the Sites’ values, and facilitating networking, training and sharing of good practice amongst those involved in their management.

WH:UK’s three strategic aims:
1. Advocate at all levels for the joint benefit of the UK’s World Heritage properties and for the World Heritage Convention.
2. Facilitate and encourage networking between organisations and individuals that play a role in the management of the UK’s WH Sites for their collective benefit.
3. Promote the UK’s World Heritage Sites, in collaboration with key partner agencies, to a national and international market so as to allow more people to experience the Sites in ways that are appropriate to their differing situations and pressures.

Our Core areas of activity are:
A. Develop, support and manage a network of Site Coordinators
B. Hold regular high-profile conferences
C. Establish and maintain effective direct links and regular communications with government ministers, DCMS and agency staff, advisory bodies and the UK National Commission for UNESCO
D. Develop and deliver a promotional strategy for all UK World Heritage Sites
E. Develop, implement and maintain an effective communications function

WH:UK is the only independent organisation exclusively focussed on World Heritage in the UK, and the only one that is led by the Sites themselves, reflecting a community-driven approach favoured by UNESCO and which has proven effective at many Sites. WH:UK has spent its first five years quietly establishing a reputation as an organisation that delivers strong networking and support for those involved in the management of World Heritage Sites. We have become a conduit for national bodies wishing to communicate with World Heritage Site managers on the ground and have a thorough understanding of the issues and challenges they deal with.

Whilst most of the UK’s 32 World Heritage Sites are valued locally for their culture, education, environmental and economic contributions, this is not always recognised at a national level. The UK could do more to collectively recognise, promote and resource its Sites, and WH:UK seeks to take a leading role in championing this cause. Our membership is small, but our members are extremely active and greatly value the knowledge-sharing, support and big-picture perspective that WH:UK offers.
WH:UK carried out a comprehensive Review of the State of UK World Heritage Sites (the Review) in 2019. The Review found that WHS face significant challenges for their future sustainability and the 2020 Coronavirus Pandemic has, in many cases, exacerbated this. The Review also revealed that WHS are a ‘sleeping giant’ in terms of their tourism, heritage and cultural value and potential. It is also increasingly recognised that WHS have a role to play in post Covid reconstruction.

We are now seeking a Proposal from a Business consultant to assist in the development of a business strategy to guide the future development of WH:UK, and help us increase our organisational capacity and prospects for survival - and, ideally, growth - over the next 3-5 years. This consultancy forms part of WH:UK’s “Unlocking the Potential Project” which is 100% funded through a Resilient Heritage Grant from the National Lottery Heritage Fund.

“Unlocking the Potential” Resilience Project

The WH:UK “Unlocking the Potential Project”, running between October 2019 and March 2021, is providing essential support to help WH:UK work towards its Vision. The Project is focussed on strengthening our internal ability to deliver the strategic aims of WH:UK and enhance our capacity to do more going forward. A more sustainable WH:UK will be able to take a leading role in advocating vocally for the UK’s World Heritage Sites, proactively raising awareness, building capacity, promoting management best-practice and fostering and facilitating the continued support and up-skilling of the World Heritage Community.

A project manager has been appointed on an 18-month contract to review the organisation’s Governance, develop a Communications & Engagement Strategy, oversee the development of an organisational Business Plan and fundraise for new projects.

Taking Coronavirus into account:

The first half of 2020 saw the spread of the COVID-19 pandemic and at time of writing, (July 2020) the UK has just begun emerging from its first lock-down. Whilst the ramifications of the pandemic for our sector are still being understood, the impacts so far have highlighted some fundamental weaknesses in WH:UK’s operational model. The uncertainty about social interaction - including volunteering - and the financial limitations our sector will be facing in the coming years make the functional and financial impetus for WH:UK to explore new and alternative ways of doing ‘business as usual’ all the more pressing.

In the light of Covid 19, WH:UK has looked again at its 2019 Review, and continues to make the case for an overarching Strategy which will identify the priorities for future investment to support the long-term recovery of the World Heritage sector.

WH:UK - The Current Position

Under normal circumstances, WH:UK generally hosts three to four events per year:

- **Spring** – Technical meeting – on a specific technical subject of relevance to the membership
- **Summer** – Members’ meeting – on a more general theme, specifically for Coordinators, focussing on knowledge-sharing and a behind-the-scenes site visit
- **Autumn** – Annual Conference and Members Annual General Meeting
- **Winter** – WHS Steering Group Chairs meeting
In addition to delivering events, we circulate the occasional newsletter, technical updates and blogs to our members. In the last few months, as a response to Covid19, WH:UK has also begun hosting a well-attended monthly WHS Co-ordinators forum via Zoom.

Not including the full-time 18-month role of the Resilience Project Manager, our current level of activity is delivered by two part-time consultants who work on a one-day-a-week (recently reduced from two-days-a-week) and one-day-a-month basis. Both have been with the organisation since 2015. Additional contributions are made by the Board of 12 Trustees and the President who give their time voluntarily. We have also recently recruited a graduate Comms volunteer who contributes about 5 hours a week. The ratio of volunteer time to paid staff time is roughly 3:1 and comes to roughly 1.7 full-time-equivalents.

The WH:UK’s Internal 2016-2017 Outline Strategy, which focussed on Vision and Mission, has successfully guided the establishment and promotion of the organisation to date. The NLHF bid for the Resilience project also contained an outline Business Strategy and 5-year financial targets. These will need to be revisited and integrated with a new 5-year strategy and a detailed 3-year Business Plan for the period 2021-2026.

The target for the consultant(s) would be to create a framework that would guide WH:UK towards being a fully sustainable organisation by 2023. Given the current uncertainties, the consultant(s) will be required to generate and assess a variety of practical and sustainable business options for the future development of WH:UK.

**Scope of Work:**

**Key Project Objectives:**

- The generation of a 5-year Business strategy and accompanying 3-year Business Plan to guide the evolution and development of WHUK over the next 3-5 years.
- Devise a framework for enhancing the organisational capacity and future resilience of WH:UK
- Development of briefs or action plans for further project development and fundraising opportunities

**The Tasks:**

To achieve the above, the consultant will provide (but not necessarily be limited to) the following:

1. An oversight and assessment of how the World Heritage sector will evolve in the next few years; an appraisal of where the risks and opportunities lie for WH:UK in the wider areas of heritage, culture and environment
2. A critical appraisal of the structure and cost-effectiveness of WH:UK’s current ‘business as usual’ position including its activities, financial basis and budgeting, revenue sources, resource allocation, staffing and volunteer input
3. Generation and testing of business options and scenarios with recommendations for the optimum sustainable business model for delivering WH:UK’s current strategic aims of networking, advocacy and promotion
4. Suggestions for a sustainable organisational structure for each option and related staffing and costs
5. Assessment of the activity, services, and support currently provided by WH:UK to members and wider stakeholders and provide recommendations for income enhancement
6. Assessment of the WH:UK membership offer and recommendations for enhancing income from this area of activity
7. Identification of other potential income sources for WHUK, tempered by a cost-benefit analysis related to resource capacity and capability for obtaining said income
8. Provision of promising sources of funding and recommendations for areas with potential for project development which stand a higher chance of securing funding in the current climate
9. Delivery of a project workshop to present business options and tease out the preferred option(s) with the WH:UK Board of Trustees
10. Refinement and fleshing out of preferred option(s) and development of the above into a 3-5 year business plan

The result of this work will be a clear agenda for WH:UK’s further development over a 3-5 year period and a sustainable operating base from which to expand our activities.

Consultant(s) should propose imaginative and flexible ideas that will exploit WH:UK’s USP as outlined in the Strategic Objectives (above) and its long-term aspirations to be a vocal and respected player in the UK Heritage sector. They will also need to take into account long-term operational and sustainability considerations for the organisation.

We fully appreciate the complexity of developing such a plan in an ever-shifting environment. Our aspiration is to develop something that will enable us to be strategic yet responsive to changing circumstances (be they financial, organisational, digital, sectoral or viral). We will work with the appointed consultant(s) to ensure they have the background information required to direct this study effectively.

The Stakeholders:

Some 80 different organisations have a responsibility for or an interest in the management of UK WHS (see our Review Summary Report page 22). WHUK aims to represent all 32 WHS and has a pivotal role in bridging the gap between local managers, the State Party (DCMS), and other stakeholders.

For this project, the stakeholders are:
1. The WHUK Board and existing staff
2. The WHUK Membership
3. The NLHF
4. Key External Stakeholders (including, DCMS, HE, HES, Cadw, NIEA, and others)

The WHUK Board will be represented by the Resilience Project Manager and will act as the client. She will represent the views of the membership and will canvas their views as necessary. The Review reports (see WHUK website) contain an overview of the roles of the Key Stakeholders. Selected interviews with these parties may assist the consultant(s), but an extensive consultation will not be necessary as part of this project.

Reporting and Outputs:

The successful consultant(s) will be responsible for the preparation of a Business Options Appraisal (Output 1) that results in clear and evidence-based conclusions built on research, surveys, economic and market evidence for each option. This will then be followed by a more detailed 3-year Business Plan (Output 2) once the preferred option has been identified. The whole thing will be compiled into a Final Report at the end of the contract (Output 3).
Alongside scheduled update meetings, the appointed consultant(s) will be expected to produce and deliver two Powerpoint presentations outlining progress (which can also be circulated and read outside of the meetings in which they are presented). The first will act as an interim report outline the Options (Powerpoint 1) to the WH:UK Business Planning & Strategy Group and later to the whole WH:UK Board in order to facilitate the ‘workshopping’ a preferred option. The second (Powerpoint 2) will accompany the final report at the end of the contract. The Appointment Timetable (below) outlines the desired timescales for this.

Research, findings and recommendations should be brought together into a concise, illustrated Final Report with supporting annexes. The Final Report will provide specific guidance on the preferred development option for WH:UK based on robust and evidence-based conclusions, together with clear ideas and recommendations on the mix of activities that could be sustainably supported by the organisation for the benefit of our members and the wider World Heritage Sector.

The Final Report will be expected to contain the following:

- Strategic background
- Political, and socio-economic context
- Project details/objectives
- Financial appraisal and cost/benefit analysis
- Options appraisal - including a weighted scoring matrix for evaluating options
- Options for enhancing the WH:UK membership
- Organisational implications, including governance, management, staff and trading
- Detailed Business Strategy (5 years) and Business Plan (3 years) for the Preferred option
- Implementation Strategy, action plan and indicative timetable
- Risk register
- Recommendations for monitoring and evaluation

Annexes will contain:

- Financial projections
- Cash-flow projections
- Summary income and expenditure account
- Indicative balance sheet
- Best and worst case scenarios
- Case Studies and comparable exemplars

Any financial analyses or data compiled for use in any of the report should also be provided in Excel format.

**Contract Administration:**

The consultant will be appointed and managed day-to-day by the Resilience Project Manager, overseen by the WH:UK Business Planning & Strategy Task & Finish Team and reporting to the Board of Trustees.
**Tender Procedures:**

**Technical Proposal:**
Interested parties will submit a proposal in response to the Brief which should include the following:

- The intended approach, methodology and timescales, including:
  - Programme of work;
  - Description of the timescales, tasks and approval points;
  - Description of the Proposed Outputs;
  - How the project will be managed and quality controlled from the consultant(s) side.
- The professional skills, experience and qualifications offered for the project, including the names and CVs of proposed key members, their relevant expertise and specific responsibilities.
- Strong examples of previous, comparable work within the last five years
- Proof of professional indemnity insurance (£1 to £5m depending on practice size)

**Financial Proposal:**
The project has a fixed fee total of £12,500 (including expenses; excluding VAT). The consultant(s) should set out the following in the financial proposal:

- staff time and cost allocated to project tasks and stages
- day rates of staff allocated to the project
- an indication of likely expenses to be incurred
- proposed payment schedule in relation to outputs and programme

**Documentation available:**
Interested consultants will be expected to demonstrate a thorough understanding of the brief, and should familiarise themselves with the following sources to aid in the preparation of tenders:

- WH:UK Website and social channel content
- Draft WH:UK Annual Report and Accounts 2019-20 (on our website)
- UK World Heritage: An Asset for the Future reports (also on our website)

Further resources will be supplied on appointment and instruction, including:

- Resilience Project Documentation
- Further detailed financial information

WH:UK staff will be available to support the consultant(s) in activity such as contacting members and stakeholders and supporting additional surveys if required throughout the project period in order to obtain value for money from the consultant(s)’ time.
Tender Evaluation:

The tender will be evaluated using the following criteria and weightings:

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<tr>
<th>Criteria</th>
<th>Weighting</th>
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<tr>
<td>Value for Money</td>
<td>30%</td>
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<tr>
<td>Response and Understanding of the brief</td>
<td>30%</td>
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<td>Assessment of ability to deliver on time, within budget</td>
<td>20%</td>
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<td>Relevant expertise of key proposed team</td>
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<td>Relevant prior experience</td>
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Appointment timetable:

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<th>Activity</th>
<th>Date</th>
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<tr>
<td>ITT and Brief goes live</td>
<td>Thurs 9th July 2020</td>
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<tr>
<td>Closing Date for Tenders</td>
<td>Midnight Sun 2nd Aug 2020</td>
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<tr>
<td>Shortlist Interviews (requiring a presentation and Q&amp;A) by Zoom</td>
<td>Fri 7th August 2020</td>
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<td>(If you are shortlisted, you will be notified and invited to interview by Tues 4th August)</td>
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<tr>
<td>Offer of Contract and inception meeting</td>
<td>w/c Mon 10th August 2020</td>
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<td>Contract Commences</td>
<td>Mon 17th August 2020</td>
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<td>Presentation of Preliminary findings (interim report) to Business</td>
<td>Early October 2020</td>
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<td>Planning &amp; Strategy Group for feedback</td>
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<tr>
<td>Presentation of Options to WH:UK Board Workshop the Preferred Option for fleshing-out.</td>
<td>Mid/Late-October 2020</td>
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<tr>
<td>First Draft of Final Report including preferred option</td>
<td>Early November 2020</td>
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<td>Final Report complete (Ideally in advance of WH:UK AGM - date TBC - likely to be early December)</td>
<td>Late November 2020</td>
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<tr>
<td>Completion &amp; Wash-up meeting</td>
<td>Dec 2020</td>
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WH:UK will require the appointed consultant(s) to present progress at a series of meetings to be set well in advance with the Resilience Project Manager. Depending on the Covid-19 situation in the autumn, this may all occur online, although an in-person Workshop in London to present the options to Trustees would be preferable.
**Terms & Conditions:**

The draft report of the Options Appraisal and a Final Report with a fleshed-out Business Plan for the preferred option will both be submitted in electronic format.

Copies of any images, spreadsheets, consultation data or other material procured in the course of the commission should be transferred in digital format to WH:UK at the conclusion of the contract. We will also expect copyrights of material procured and produced to be transferred to WH:UK at the completion of the contract.

Final payment for the contract will be made on receipt of a satisfactory final report.

The consultant(s) will be expected to comply with the WH:UK Data Protection policy and confirm that any stakeholder contact information shared by WH:UK for the purposes of this contract will be appropriately protected and not used for any other purpose.

**Next Steps:**

For further information, expressions of interest, and Q&A please contact the Resilience Project Manager:

- email: [tiva.montalbano@worldheritageuk.org](mailto:tiva.montalbano@worldheritageuk.org)
- Tel: 07585 971 749

Proposals should be submitted by email to the address above no later than 23:59 on Sunday the 2nd of August.

Tenderers who have been shortlisted will be notified on Tuesday the 4th August and invited to attend an online interview on Friday the 7th August.