



Audience Development Consultancy Brief

6 March 2019

Brief and specification for Audience Development consultant(s) to produce an Audience Development Strategy and Activity Plan to support the development of the Trust and capital development programme to create a new museum in Street, Somerset.

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Introduction



The Alfred Gillett Trust was established as a charitable entity in 2002 to preserve the heritage collections of C & J Clark International Ltd., the global footwear manufacturer, and the Clark Family who established the company in 1825. We are the custodian of a Grade II listed building, the Grange, in the village of Street, Somerset, which houses our purpose-built archive store along with office facilities for staff and volunteers to support those wishing to access the history and the heritage represented by the collections. Our vision is to create a new Accredited museum within the Grange by 2024.

In 2018 the trustees approved a capital development programme which aims to complement the existing archive and heritage service by creating a new museum. Plans to replace the current company-run Shoe Museum in Street have been discussed for many years, and following the successful receipt of a capital grant, we are now in a position to commit to the project. The museum will be designed to meet national museum standards for collections care, to provide a high-quality visitor experience and to make it financially sustainable. Before making an investment, we wish to understand our current and potential audiences and develop a strategy to engage with our audiences to support the capital development work.

Our Statement of Purpose

The purpose of the Alfred Gillett Trust is derived from its charitable objectives of the CIO which state it was established to advance public education through:

- preserving within a library, archives and records centre the historic papers, records and exhibits connected with the footwear and shoemaking industry in the town of Street and the surrounding area and elsewhere; and those who developed said industry and trades particularly in Street and the surrounding area; the domestic and social life of the area; and the Religious Society of Friends;
- exhibiting to the public historic shoes, material, machinery, equipment and buildings used in connection with said footwear and shoemaking industry and its supply and distribution trades;
- exhibiting to the public fossils and other articles of historic interest or articles of artistic merit including paintings, drawings and works of art of all kinds.

Our Vision and Mission

Our Vision and Mission statements were developed in 2015 and focus on our core purpose connected to the footwear and shoemaking industry. These are general guidance statements which do not reflect our full aims and objectives and require updating to reflect recent developments.

- Our vision is to inform and inspire the public by sharing the cultural history of shoemaking.
- Our mission is to share the rich history of Street's shoe industry, demonstrating the principles of stewardship, integrity and community-mindedness, upon which the collection was founded, and inspiring the next generation of creators, thinkers and innovators.

Our Strategic Aims

Our strategic aims are the means through which our vision will be implemented and provide a framework for our key activity areas:

1. Improve the standards of collections care, storage and documentation
2. Increase access to the collections through outreach and engagement
3. Professionalise the Trust's services, facilities and management
4. Realise the Trust's capital development aspirations

Our Values

In order to guide the manner in which we achieve our vision, we embraced six organisational values in 2016. These values will be informed and developed by the planned audience development work and are:

1. *We will serve our community effectively:* We will understand the needs of our community and of our stakeholders and serve them responsibly and sustainably.
2. *We are committed to equality and mutual respect:* The fair and respectful treatment of our stakeholders, staff, volunteers and visitors is vital. We will encourage collaborative working, co-production, open and honest communication and fair practice. Intellectual and physical accessibility will form the basis of all that we do.
3. *We are committed to continuous improvement:* We will encourage innovation and benchmark our service provision against regional, national and international peers.
4. *We will maximise our opportunities and resources sustainably:* We will seek to capitalise on our existing resources, encourage future investment in our institution and employ due diligence.
5. *We will achieve best practice:* We will achieve excellence in the standards of our audience engagement and collections stewardship.
6. *We support the wider sector:* We are committed to upholding the Museums Association Code of Ethics and to supporting the aims and ambitions of the wider cultural sector. We will work collaboratively with local and national partners to support partnership initiatives.

Our Development

The Alfred Gillett Trust is a Charitable Incorporated Organisation (CIO) governed by a board of six trustees made up of Clark family members who set the strategic vision and meet 4 times per year. The Trustees are guided by the Foundation Constitution of the CIO, dated 11 February 2016 (#1165528), although it had previously been registered as a charity on 10 February 2004 (#1095901). The Director and Senior Management Team have the authority to implement the Trustees decisions. 11 FTE members of staff are employed at the site, including 6 professionally qualified curators and archivists. They are supported by a pool of around 40 local volunteers who are recruited for specific collections or outreach-based projects and events.

The archives and objects in our care (see page 4) represent one of the most preeminent corporate collections in the world, comprising material which illustrates the outputs of almost two centuries of shoemaking and testifies to the charitable and political interests of the Quaker Family who founded the firm. Over 150,000 items make up the collection which includes: archives; footwear; shoemaking machinery; point of sale; film and sound archives; fossils; artwork; furniture and costume. Over 80% of

these collections are owned by the company. Due to close links with C & J Clark Ltd. through shared collections and services, a Grant Funding Agreement and a Collections Loan Agreement were implemented on 6 February 2018 to ensure the Trust and the company are aligned where possible on activities and resource allocation.

Our income is generated predominantly through three sources: grants from C & J Clark International, grants from Clark-family trusts and investment income from our shareholder dividends in C & J Clark Ltd. As shares and dividend payments fluctuate with



the markets, our long-term financial sustainability is difficult to predict. Since 2015 we have seen an 86% reduction in income from investments we relied upon and have broadened our portfolio of income generating activities through charging for services, creating new services and managing our finances. One-off grants have historically been sourced from grant giving bodies and trusts to complete discrete projects. As financial sustainability is a key concern for the Trust, our planned audience development work will coincide with a period of review, business planning and budget development.

We are currently open to the public by appointment only, with a number of talks, public events, exhibitions and collaborative projects hosted throughout the year on the Grange site. These are advertised online and in the local media and generally take place Monday-Saturday 10-5pm, with extended opening hours applied on an event-by-event basis. Private tours, research services, photography and digitisation are offered for a fee.

We have grown rapidly over the last 10 years, recruiting a large team professionally qualified staff and investing heavily in the development of the Grange site as an archive and research centre. We recognise a significant amount of work is required to further professionalise our service, make it financially sustainable and achieve our vision. Historical materials which have been deposited with us over a long period of time require documentation and conservation, as well as research into their ownership and provenance. We have developed a heritage service for the community with a growing reputation for collaboration and outreach, but this is currently done with little strategic planning or alignment to our audience's needs.

- 2002 Our charity is formally established and registered, with three staff caring for Clark family and company collections at #44 High Street in Street
- 2010 We take ownership of the derelict Grade II listed Grange site and recruit an Archivist and a small team of dedicated heritage professionals
- 2011 We begin the £2.5m refurbishment of the Grange and the construction a new purpose-built and environmentally controlled archive for the family and company collections
- 2012 Our staff move into the Grange and begin cataloguing the 100,000-strong collection, gradually moving them into the new archive and offering a research and enquiry service
- 2013 With funding from the company, we begin an important project to catalogue and digitise key company collections, enabling them to be properly conserved and accessed more widely
- 2015 We recruit a Director to begin developing plans for a new store to preserve the offsite collections and a museum to provide an opportunity to showcase the developing collections
- 2017 We work with Clarks to formalise our relationship, and the company collection is loaned to us on a rolling 3-year basis in preparation for the new museum

- 2018 We begin planning the development of a new museum on the Grange site and secure £4m towards the capital development
- 2019 Phase I of the capital development programme begins with the research and development of the museum’s offer, audiences and business plan

Our Collections

The collections contain a significant range of items relating to the shoemaking industry, local history, Quakerism and geology (Alfred Gillett, 1814-1904, researched and assembled the ichthyosaur fossils to create a collection for which Street is internationally renowned). The archive includes more than 1 km of shelving for family and business papers within which the documentary history of a notable Quaker family is contained, with extensive documents relating, for example, to John Bright MP (1811-1899) and Jan Smuts (1870-1950). Family archives also contain information about topics such as the role of Quaker women in social reform movements, including suffrage, temperance and the abolition of slavery.

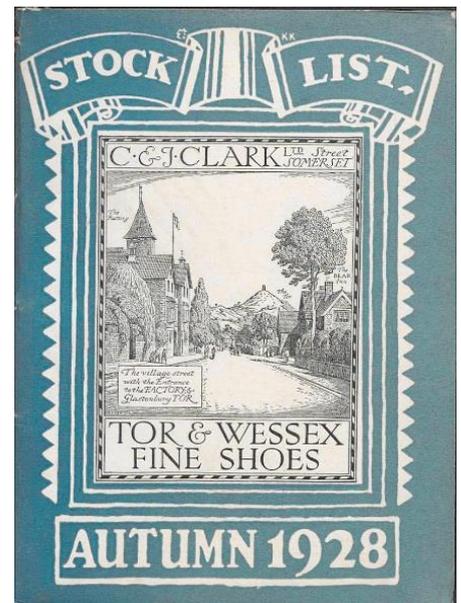
The shoe collection comprises an estimated 25,000 items of footwear. These come from a wide range of sources including C & J Clark International Ltd., other national and international manufacturers, a “world shoes” collection assembled by members of the Clark family, plus historic items of footwear dating back to the Roman period. The collection continues to grow as further items and papers are deposited by the Clark family, C & J Clark International Ltd., and the public.

The existing collections in our custody include those loaned by C. & J. Clark Ltd., several groups of materials privately owned by descendants of Cyrus (1801-1866) and James Clark (1811-1906), items on loan to C. & J. Clark Ltd., through the Shoe Museum and those owned outright by the Trust. These collections may be described under three broad subject areas: History of Clarks, History of Shoemaking and History of the Clark Family.

History of Clarks

Collections either generated by or brought together by C. & J. Clark Ltd. form a significant majority of the overall collection. The company which became C. & J. Clark Ltd. in 1903 was established in Street, Somerset in 1825. The two Quaker brothers who founded it, Cyrus and James Clark, and subsequent generations of the family developed an international manufacturing, wholesaling and retail company which remains a recognisable footwear brand today. Particularly evident throughout the 19th century, the Quaker influence on the development of the company is fundamental and a core area of interest for researchers.

Taken as a whole, this material embodies an unrivalled representation of the socio-industrial history of a key business within the 19th and 20th century British boot and shoemaking industry through its material culture, both in scale and diversity of the types of material in the collection. Interrelation within the collections (i.e. between products, archives, machinery etc.) is a particular strength, meaning historical developments can often be interpreted in detailed context.



History of Shoemaking

Due to the express intention in the two museum collections of representing the general history of shoemaking, the collections contain examples of footwear not made by Clarks, dating from the Roman

period to the 20th century. Several significant British, European and North American manufacturers are represented, for example I Miller (USA), Salamander (Germany), Bally (Switzerland) and Bata and Svit (Czechoslovakia).

The earliest footwear items in the collection are fragmentary Roman leather sandals, some of which were excavated locally. 18th century footwear, made before the advent of mechanised production, illustrates some of the main stylistic changes of that century (mainly women's). 19th century footwear includes several examples made in the USA, demonstrating that country's industrial output and stylistic and technological influence on the British trade. The collections include approx. 560 examples of traditional styles of footwear from around the world, which were assembled as an 'Ethnographic Collection'. These items range in date from the 19th century to the 2000s.



The company-owned collection includes examples of footwear (and often related packaging) not made by Clarks and representative of the British boot and shoe trade in the late 19th and 20th centuries. Significant manufacturers represented within this material include: Peter Yapp Ltd. (London), Hickson & Sons (Northampton), Manfield and Sons Ltd. (Northampton), Lotus Ltd. (Stafford), G B Britton and Sons (Kingswood) and James Southall and Co. Ltd. (Norwich). The heritage collections of K Shoes (Kendal) comprise a significant group of material including men's, women's and children's footwear made by K Shoes and others, point of sale materials, product catalogues and archival material.

History of the Clark Family

Material brought together within the private collections of various lines of the Clark family forms a substantial part of the collection. Whilst some parts are indistinguishable from material relating to the company history, other areas are significant in their own right in respect to topics outlined below. Many of these collections remain in private ownership (often shared between individuals as inheritors of a line) and are in our custody informally.

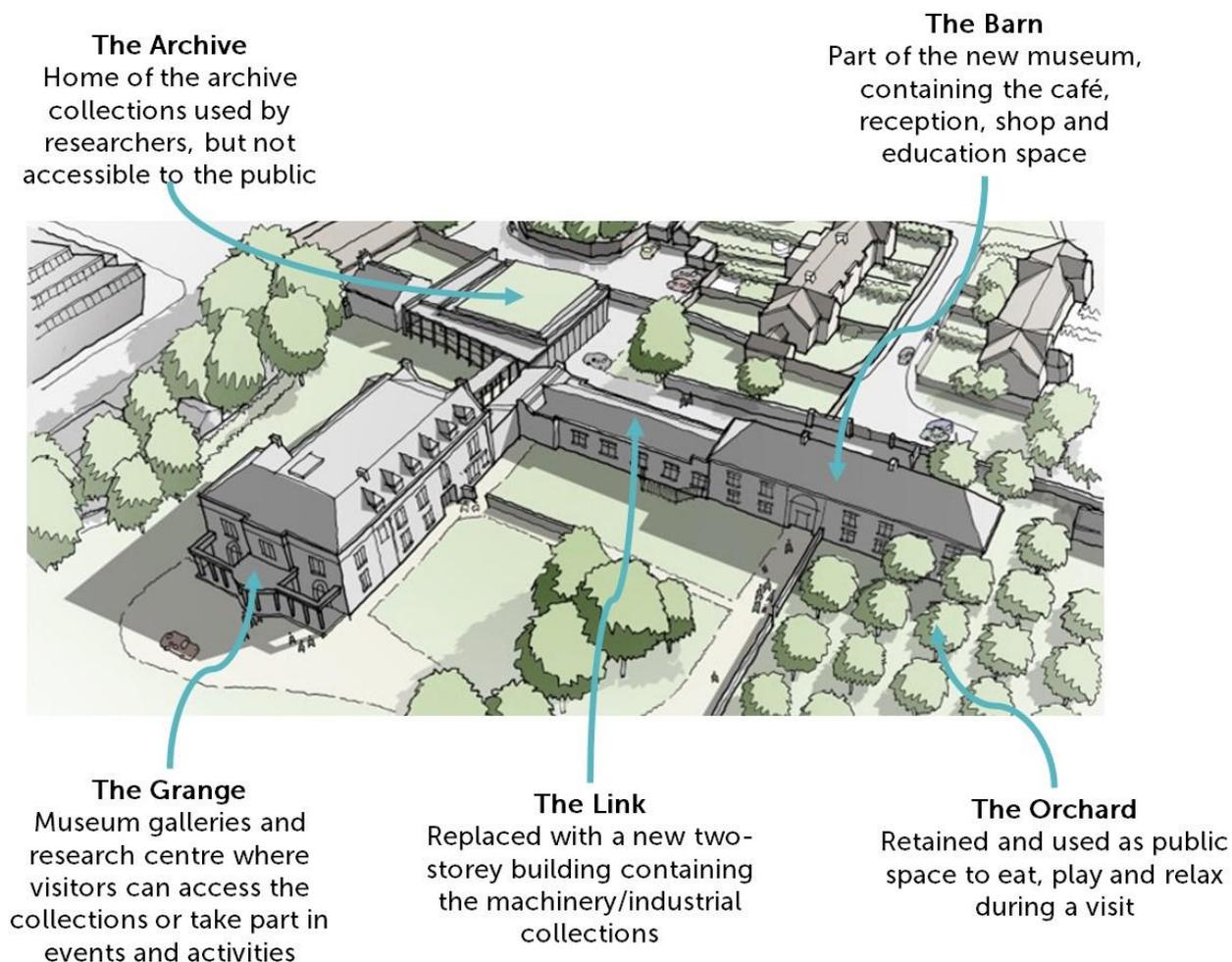


Family collections include diverse material: furniture, costume, household textiles and objects, correspondence, diaries and personal papers, photographs, paintings and audio-visual material. Due to the nature of collecting (largely by house-clearance and in the absence of a formal collecting strategy) there are large quantities of personal papers, costume, furniture and household items which have no recorded relationship to any other area of the collection, except that they were once owned by individuals or families in some way related to the Clarks of Street.

Our Vision for 2025

Our vision is to create a museum and archive as a source of knowledge, learning, inspiration and enjoyment by 2025. The museum will showcase the many diverse interests of the Clark family members and aims to create an important historical and cultural asset which will illustrate excellence and innovation in shoemaking, branding and retailing in a national and international context.

The new museum is planned to be built on the site of the Grange by 2025. As currently envisaged, the museum will contain 10 galleries that capture not only the richness of the extensive footwear collection and archive, but also the story of the family business, C & J Clark International Ltd., the Quaker family and significant chapters in the social and political history of the UK, and particularly of Street in Somerset.



Based on a conservative estimate, the museum will target 40,000 visitors per annum, paying an appropriate entrance fee. Provision will be made for galleries to be updated and refreshed annually, with other opportunities for collaborations with national and international lenders for temporary exhibitions. We envisage other income-generating activities taking place on the site, including outreach, events, room and venue hire, as well as a café and a shop. There is plenty of scope for developing further opportunities given that the site of the Grange also has sufficient land (c. 2 acres) to develop additional facilities and outdoor activities.

In conjunction with the capital development of a new museum, we also plan to improve the storage conditions and facilities for the internationally significant collections we hold. Our current dilapidated store will be replaced with a new large object store in Street and will be designed to contain the impressive shoe machinery collection. The store will be designed to provide the optimal conditions for long-term preservation and by designing the building with open storage in mind, there will be opportunities to offer limited public access to reserve collections not on display via the museum.

Our Location

We are based in the Grange, a three-storey Grade II listed manor house in the heart of Street. The site consists the main house used as offices linked to a two-storey barn by ways of a single-storey dilapidated

building currently used as a store. The site also contains a newly built standalone archive with 4 large strongrooms, a walled orchard, 2 acres of grounds and small staff car park. It has played a key role in local life for many centuries, having been a school, a refugee hostel, a hospital, a training centre and even a cinema.

Located only 150m from the Clarks company headquarters, it shares a boundary with Clarks Village, a retail outlet attracting 4.1 million visitors a year, whose main car park includes 70 spaces owned by the Trust. The company-run Shoe Museum is located 300m from the Grange site and has been operating since 1974. It contains chronological gallery displays on the footwear manufactured by Clarks, as well as comparative historic footwear from international manufactures. The museum will be closed in advance of the new museum development, but no date has yet been fixed.



The Brief

Overview

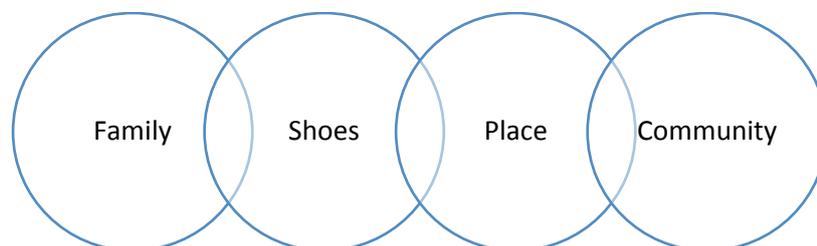
The construction of the new museum is scheduled to be completed in 2024 and a Project Plan gives the major milestones for the architectural and design elements, which are due to begin in 2020.

In advance of this work we wish to appoint an Audience Development consultant(s) to work with the Capital Development Project Team to develop our Audience Development Strategy and 5-year Activity Plan to inform the capital development programme. This will involve the planning, organisation and implementation of a number of consultation sessions engaging with current and new audiences from June 2019. The consultant(s) will collate and review the information gathered at these events using it to produce an Audience Development Strategy, developing the recommendations into a 5-year Activity Plan.

The audience development work will take place concurrently with the development of a new business plan and funding model for the Trust, and the consultant(s) will be expected to work with the Business Planning consultant(s) to develop a strategy and plan which is realistic and achievable within our resources.

Key Themes

Wider interpretation planning and vision setting for the core offer of the new museum is yet to take place and will be progressed following the completion of the audience consultation and strategy development to ensure the plans for the new museum are audience-focused. However, through work done to create the Collections Development Policy has identified that several key themes will form the basis upon which the visitors build their understanding and experience:



In detail this could include, but is not restricted to:

- Quakerism and the Clark family's influence on social, political and economic developments.
- The rich history of Street's shoe industry and its impact on the world.
- The science and innovation behind footwear design, manufacture and retail.
- The role of shoes in social, political and economic life.
- The role of communities and individuals in the industry.
- The history and heritage of the locality of Street.

Output 1: Audience Development Strategy

The Audience Development Strategy will be used to inform all we do at the Trust and will provide the practical means for helping staff make evidence-based decisions about programmes and projects based on where there is potential to have the greatest impact on enriching the visitor experience, audience growth and return on investment. It will help us plan for the future in many ways, including where to invest, what is best to develop, measure the organisation's activity and 'products' and forecast visitor numbers.

It is expected that the Audience Development work will:

- Establish baseline information about current audiences, including residents and visitors by collating existing research and updating this where appropriate.
- Identify how audiences currently value and engage with the shoemaking and local heritage represented by our collections.
- Identify the priority audience groups for the scheme. Consider the characteristics, needs and interests of each audience group and identify how best to overcome any barriers and engage with them to promote greater understanding of the aims and objectives of the project.
- Develop communication messages/approaches which are appropriate to the needs and interests of the target audiences.
- Plan and cost a programme of events and activities to engage communities.
- Identify future audience engagement trends and present a SWOT analysis on future engagement potential with our heritage.
- Make recommendations for monitoring and evaluating the success of audience development.
- Outline a way forward with recommendations
- Develop a set of recommendations for the Activity Plan based on the above.

Output 2: Activity Plan

The 5-year Activity Plan builds on the audience development work and will:

- Outline a way forward with recommendations for events and activities to engage communities during the development and delivery phase of the new museum.
- Work with the Business Planning consultant(s) to ensure the activity plan is realistic and achievable to our resources.
- Include a costed and timetabled programme of scheduled activities.
- Make recommendations for monitoring and evaluating the success of the Activity Plan.

Consultation & Research

We would expect that following people and audience groups to be consulted when developing the Strategy and Activity Plan:

- Alfred Gillett Trust staff, Trustees and volunteers.
- Senior Leadership Team of C & J Clark Ltd. and current and ex-employees including pensioners.
- Roger & Sarah Bancroft Clark charitable trust (R&SBC), as major revenue and capital funders
- Clark family members, trusts, the Family Shareholder Council (STFC) and Quaker Meeting.
- Visitors to the current Shoe Museum and Clarks Village.
- Landsec, managers of Clarks Village retail outlet.
- Local and district authorities including Street Parish Council and Mendip District Council.

The following people and audience groups could also be considered:

- Business located within Clarks Village retail outlet and the wider Street environment.

- Formal and informal education providers including KS1-5, higher education and adult education.
- Local residents and community groups.
- National groups such as the Institute for Family Businesses (IFB).
- Tourist information office and selected local tourist attractions.
- Sample groups composed of those thought most likely to use the proposed museum/archive.
- New, diverse and/or hard to reach audiences and community representatives.

Timetable

10 May 2019	Deadline for tender
20-22 May 2019	Interviews and appointment of consultant(s)
03 Jun 2019	Start date
Jun-Aug 2019	Consultation and research, liaison with Business Planning consultant(s)
23 Aug 2019	Submission of draft Audience Development Strategy and Activity Plan
01 Nov 2019	Submission of final Audience Development Strategy and Activity Plan
31 Jan 2020	Final payment of consultant(s) fees and expenses

Resources

The following resources will be made available to the successful consultant(s) to support the audience development work:

- £5,000 towards audience development consultation expenses.
- Free room hire to conduct consultations on the Grange site.
- Access to the knowledge and skills of the Trust's staff.
- Access to the Business Planning consultant(s).
- Administrative support for the organisation of events and activities.

Supporting documents available upon request prior to tender:

- *Capital Development Project Plan*, giving major milestones and outputs for the overall project.
- *Strategic Plan*, describing the Trust's set up and planned activities in detail.
- *Collections Development Policy*, detailing the Trust's collections and collecting priorities.
- Visitor survey data from the current Shoe Museum 2016-2019.
- Audited annual and management accounts.
- Plans of the Grange site and environs.

This will be the first piece of audience development work done by us, giving the consultant(s) a rare opportunity to shape the development of a heritage service from the earliest stages, embedding audiences needs and expectations into future plans.

Submission of Outputs

The hard copy reports should be A4 documents with photographs and illustrations set in the text and should be presented in accessible language for a non-specialist reader. 2 hard copies should be submitted along with an electronic version of the plan on an encrypted removable storage device or via an online cloud service. A draft report is expected on 23 August 2019, with the deadline for final submission of the Audience Development Strategy and associated Activity Plan set to 1 November 2019.

Copyright

Copyright of the plans and any material quoted in it will be assigned free of charge to, and remain with, the Alfred Gillett Trust, which will retain the right to reproduce and distribute the reports as necessary to support the project and its work generally.

Confidentiality

The successful applicant(s) shall at all times keep confidential any commercially sensitive or confidential information which it may acquire in relation to the Alfred Gillett Trust or its partners and shall not use or disclose any such information. This obligation shall continue without limit in time following the end of the consultancy. The only purposes acceptable to disclose confidential information will be where: it is for a purpose related to the operation of the consultancy; with the written consent; because it has come into public domain otherwise than by breach of the consultants; or if it is required by law, or governmental or other regulatory body.

Tender Process

Tender submissions should include the following:

- Methodology and Timescale: Proposed method and programme of work.
- Key Sources: Key information and contacts to be used in undertaking the work.
- Presentation: How findings and recommendations will be presented and proposed format of outputs
- Proposed Team: Details and relevant experience of the individual/team who will be involved in delivering the contract including the number of days and daily rates of each individual.
- Budget: A breakdown of costs to include:
 - Total cost for professional services including VAT
 - Total number of days required to undertake the work and each section of the work
 - Estimated costs allowed for travel, accommodation and other subsistence, if relevant
 - Estimated costs for any other expenses such as printing
 - Total cost for all work and expenses including VAT
 - VAT Status
- Relevant Experience: Details of past work within this sector and within the scope of this work. A minimum of 10 years' experience is expected.
- Professional references from 2 similar projects relevant to the nature and scope of this brief.

Budget

The fees, travel and subsistence expenses for the contract should be proposed by the consultant(s).

A separate budget of up to £5,000 including VAT is available to cover the cost of consultation expenses e.g. incentives, catering and printing.

As part of Methodology and Timescale, the consultant(s) should provide details of milestones that they feel are appropriate and achievable. Payments will be made on completion of these milestones.

Tender Timescale

Tenders should be returned by 5pm on 10 May 2019 to:

Natalie Watson, Director, The Grange, Farm Road, Street, Somerset, BA16 0BQ

Email: natalie.watson@agtrust.org.uk

Phone: 01458 444060

Those shortlisted will be invited for interview at the Grange on 20-22 May 2019.