



Brief for a Consultancy to review the South West Heritage Trust Audience Development Strategy

1. Background

The South West Heritage Trust is seeking to appoint a consultant to undertake a light-touch review of its Audience Development Strategy to align with the Trust's new Five-Year Strategy. This work will support the Trust's commitment to supporting, empowering and enriching communities, safeguarding and improving access to our heritage and increasing our impact and organisational sustainability.

As an independent charity operating across Somerset and Devon, the Trust delivers archive, museum, learning and historic environment services, and is committed to strengthening its use of audience insight and data to inform future programming. This review will help ensure the Audience Development Strategy is strategically aligned, audience-focused and responsive to the Trust's long-term ambitions.

Working with partners, we currently deliver an ambitious programme of temporary exhibitions, public activities and community engagement in Somerset and Devon that spark curiosity, encourage lifelong learning and connect audiences with the compelling stories of the South West. The Trust is an Arts Council England National Portfolio Organisation and a Museums and Schools programme partner.

2. Scope of work

Objectives:

- To review the Trust's Audience Development Strategy, ensuring it reflects the wider strategic context and aligns with and supports the delivery of the Trust's Five-Year Strategy and charitable objectives.
- To use audience data and insights to identify audience gaps, barriers and opportunities for sustainable growth, informing future audience development priorities.
- To increase the impact, relevance and scope of the Trust's engagement work by identifying opportunities for deeper collaboration with partners and communities.
- To strengthen the Trust's use of audience research, evaluation and benchmarking to inform programming, decision making and audience development activity.
- To prioritise audience engagement activity to maximise our impact, support sustainable audience growth and deepen relationships with communities over the next five years.

Deliverables:

- A start up meeting and agreed workplan, including approach, milestones and consultation plan.

- A summary of findings from the review of audience, visitor, engagement and benchmarking data, highlighting key trends, gaps and opportunities.
- A summary of stakeholder consultation, capturing key insights, themes and implications for the strategy.
- A draft report of no more than 20 pages, including an executive summary and prioritised recommendations for updating the Audience Development Strategy.

Timeline:

- The consultancy work will commence at the beginning of July 2026 for 10 weeks ending Monday 14 September 2026. The draft strategy is due to be reviewed by the Board of Trustees 15 October 2026.

Out of scope:

- Internal staff consultation is excluded from this contract and will be commissioned separately; a summary of internal staff consultation will be provided to support the draft report.
- The strategy document will be created by the Leadership team following receipt of the summary of recommendations.

Resources:

- Relevant background documents, including the current Audience Development Strategy and the Trust's Five-Year Strategy.
- Available audience, visitor and engagement data to support the review including recent cultural segmentation work carried out by Morris, Hargreaves, McIntyre.
- Support to identify and facilitate contact with agreed external stakeholders.
- A summary of the internal stakeholder consultation when completed
- Oversight from the Leadership Team and Chair of the Audience Engagement Committee throughout the consultancy period.

3. Delivery and Outputs

We are seeking a consultancy with previous experience in strategic development and stakeholder consultation to work with the Leadership Team and Chair of the Audience Engagement Committee to review and develop the vision and objectives for our audience development work over the next 5 years. The review work will include:

- Identify key trends, gaps and areas for opportunity by conducting a high-level review of existing audience and visitor data.
- Ensure the Audience Development Strategy is relevant and aligned with the Trust's strategic ambitions by reviewing the wider strategic context (local, regional and national)
- Understand current needs, expectations, opportunities and barriers to engagement through consulting with external stakeholders.

- Identify potential areas for audience growth and diversification through analysis of audience data and segmentation information, benchmarking the Trust's audiences against local and regional datasets
- Develop a prioritised set of recommendations for strengthening the strategy to support growth and deepen engagement by drawing on internal and external consultation and audience data.
- Identify potential opportunities for partnership working, collaborative delivery and external funding that could support the implementation of the strategy.
- Draft a report of no more than 20 pages, including an executive summary, key findings and strategic recommendations for consideration by the Trustees.

4. Reporting

The consultant will report to the Head of Museums and Engagement.

5. Project Timescales

Date	Milestone
September 2026	Procurement
October 2026	Consultant appointment and start up meeting
November 2026	Review of SWHT Strategy benchmarking data
November - December 2026	Stakeholder consultation
January 2026	Draft report
February 2026	Consultant report signed off

6. Procurement

The consultant must demonstrate:

Knowledge

- Strong understanding of the heritage, museum and cultural sector, including current policy and funding contexts at local, regional and national level.
- Understanding of community engagement, inclusion and barriers to access, particularly in relation to broadening participation and improving access to heritage.
- Knowledge of funding and partnership development opportunities relevant to audience engagement, heritage and cultural activity.

Experience and skills

- Experience of stakeholder consultation and facilitation, including engaging a range of external partners, community stakeholders and decision-makers.

- Ability to analyse audience, visitor and engagement data and identify trends, gaps, opportunities and priorities.
- Proven experience of reviewing or developing audience development, engagement or participation strategies for museums, heritage, arts, cultural or charitable organisations.
- Experience of benchmarking and strategic review, with the ability to compare organisational practice against relevant peers and sector standards.
- Ability to produce clear, evidence-based recommendations that are practical, prioritised and aligned to organisational strategy.
- Excellent written communication skills, including the ability to produce concise, high-quality reports for senior leaders and trustees.
- The ability to deliver to an agreed timetable and manage consultancy work independently.

Fee:

The fee for the review is in the region of £3,000 including expenses and VAT. Staged payments to be agreed at the beginning of the contract.

How to apply:

If you are interested in undertaking this contract, please submit an expression of interest in the following form:

- A short proposal and methodology of no more than two sides of A4 setting out how you would undertake this contract and
- A timeline aligned to your milestones.
- Relevant case studies/examples of similar work.
- Details of who will deliver the work and their CV(s), highlighting any relevant skills, experience or knowledge.
- A fixed fee proposal, including all expenses and VAT if applicable including a costed breakdown of the budget by activity, detailing the number of days and including your day rate.
- The names and contact details of two referees.
- Proof of public liability and professional indemnity insurance.

Selection Criteria:

Relevant experience and track record – 30%:

- Experience of reviewing and developing audience engagement strategies and plans for cultural or heritage organisations.

Methodology and understanding of the brief - 30%:

- Understanding the brief, heritage context and audience engagement.

Capacity and capability - 20%:

- Suitability of the consultant including relevant experience, roles, availability and ability to deliver within the required timeframe.

Price - 20%:

Overall value for money based on the fixed-fee proposal, including expenses and VAT if applicable.

Procurement timetable:

Deadline for expressions of interest: 9am 12 October

Shortlisting/tender evaluation: 13 - October

Interviews (if required): 21 October