

Lowther Castle and Gardens

Business Planning Brief

The following is a brief for consultancy services required to inform and develop a business plan for the new Lowther Castle and Gardens Project.

1. Background

The Lowther Castle and Gardens site

- 1.1 Lowther Castle and Gardens is a 120 acre site approximately 5 miles south of Penrith on the edge of the Lake District National Park. The Castle and Gardens have been unoccupied since 1942 and are derelict.
- 1.2 In 2007 proposals were made to the Big Lottery Living Landmarks programme and the Heritage Lottery Fund for a £76m development of the site that would attract 750,000 visitors a year. The principle components of the scheme were:
 - Conservation of the Castle Ruin
 - Restoration of the Castle's former Sculpture Gallery
 - Provision of retail and catering facilities in the Stables
 - Restoration/conservation of the gardens
 - Construction of a sustainable energy centre
 - Vertical and horizontal circulation through the castle ruin
 - Interpretation and education facilities in the former stables
 - A 5,000sqm underground Gallery
 - A 1,500 seat outdoor Amphitheatre
- 1.3 The grant applications were declined. The principle reason for the failure of the Big Lottery application was a business plan that was considered unsustainable by the assessors. The business plan was revised to 125,000 visitors for the HLF application.
- 1.4 Development funding from the NWDA is in place to pursue new proposals for the site and funding of £11m is conditionally available. The Heritage Lottery Fund has invited an application for a new grant supported by a new master plan.
- 1.5 In January 2008 responsibility for the project passed from the NWDA to a charitable trust whose Trustees are: Bryan Gray (Chair), Charles Woodhouse, Sir Neil Cossons, Lord Melvyn Bragg, Jim Lowther, Joan Stocker and Matthew Wilson.
- 1.6 The Trustees have appointed a new project team and are considering a new master plan for the site. The project components under consideration are based on the original scheme excluding: The underground Gallery, The Amphitheatre and The Horizontal Circulation.

2. The Brief

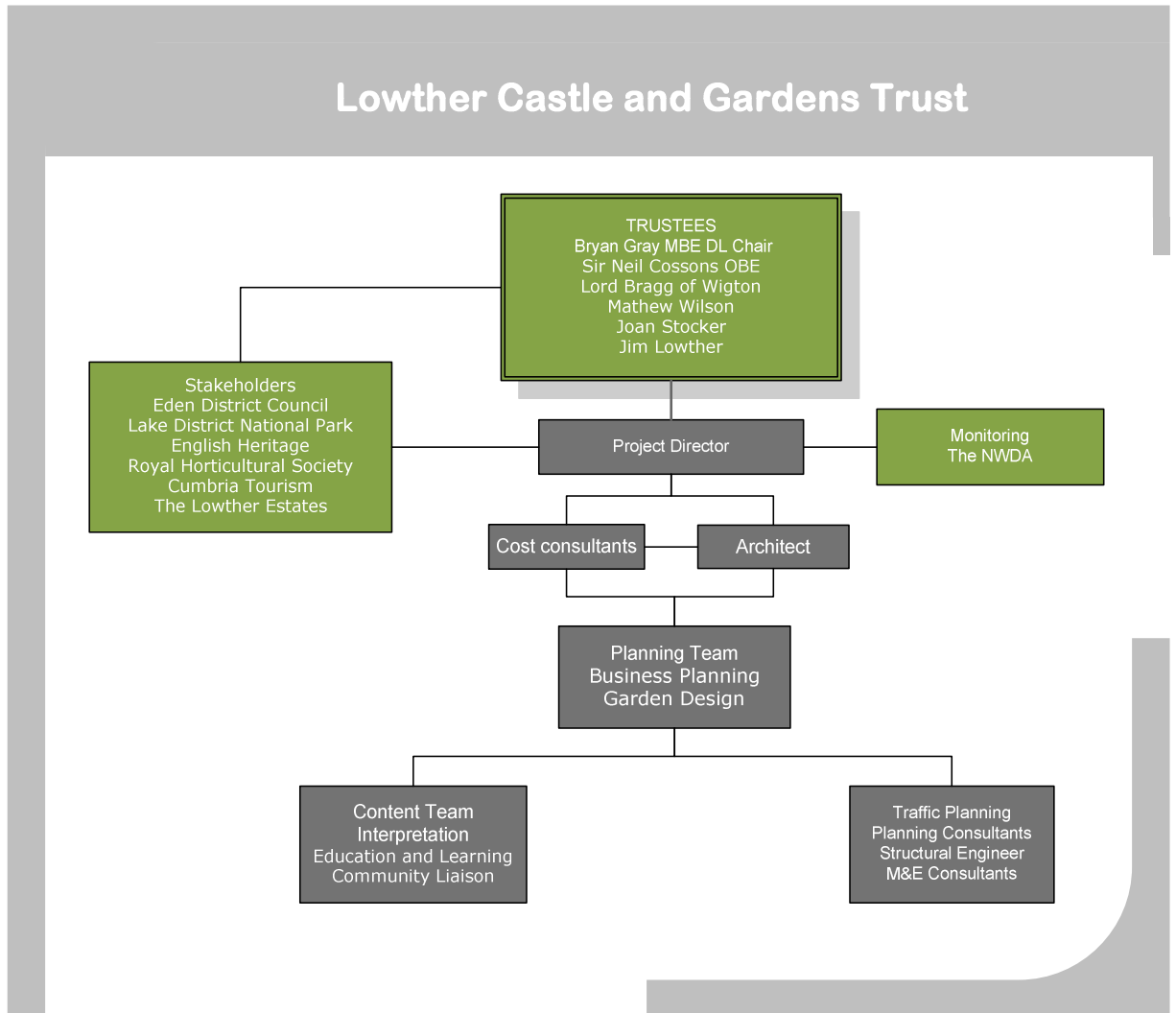
- 2.1 Expert advice is required to review and develop the business case for the project in support of a new master plan. The business case should demonstrate the visitor appeal of the new proposals, analyse the market potential and examine the strategic fit of the proposals within the Regional Economic Strategy of the North West Development Agency.
- 2.2 The business case should inform and support assumptions made in respect of the financial plan. All research and material from the previous funding applications will be made available.

Issues to be addressed.

- **Concept appraisal** – assessment of the proposed concept and analysis to demonstrate its market potential.
- **Quantitative market research** – analysis to evaluate the size of the available market for the core proposition and components that may be accessed independently – i.e. events, functions and performances.
- **Qualitative research** – to determine the needs, characteristics and motivations of the market and work to assess the appeal of the proposition to the market.
- **Displacement and regeneration** - Analysis to show the site's ability to attract new visitors to the region and assessment of the impact on local attractions and the local economy.
- **Peers and Competitor research** – analysis of peers and competitors to demonstrate the sustainability of assumptions and to define risks and lessons learned from comparable projects.
- **Market Trends and Influences** – analysis of trends and influences on the potential market.
- **Economic Fit** – analysis to demonstrate the relevance of the project to the regions needs and the regional economic strategy.
- **Funding Partner Development** – analysis to demonstrate the project's ability to meet the requirements of the defined funding partners and assessment of opportunities to develop new funding streams.
- **Competency** – analysis to show the ability of the project delivery and operational teams to deliver and operate the project.

3.0 Team Structure

3.1 The business planning consultant will form part of the core project team as detailed in the diagram shown below. As such the business planning consultant will play a key role in the development of proposals as well as the development of the supporting business case.



4.0 Working with us

4.1 If you would like to work with us and have experience that is relevant to this project please email details of your practice to work@transforminglowther.co.uk.

4.2 The Trustees will select a shortlist of consultants who will be invited to attend an interview where you will be invited to present your details of your experience and relevant projects undertaken.

4.3 The Trustees will then shortlist three consultancies and request written submission to address the following:

- **Proposed team**
- **References**
- **Methodology**
- **Outline programme**
- **Fee proposal including expenses**

4.4 Selection of the business planning consultant will be based on the Trustees assessment of quality, value, and experience.

If you require more information please call or email

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