



The Carnegie
Theatre and Arts
Centre

Summary Report

L&R Consulting

With

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117 Consulting

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1. Introduction

Introduction

1.1 In early 2021, The Carnegie Theatre and Arts Centre (The Carnegie) engaged a group of consultants to work with the Board to support them in planning a sustainable future for the organisation. A suite of studies was commissioned, comprising:

- An audience development strategy (Emma Parsons Consulting),
- A governance review and related support (Sara Hilton Associates),
- A fundraising strategy (117 Consulting)
- A building assessment and proposals for development of the facilities (Buttress Consulting)
- The integration of the above work strands together with overall project management support (L&R Consulting).

1.2 These studies have been funded by contributions from two key funding partners. These are:

- The Architectural Heritage Fund, via the UK Government's Culture Recovery Fund, administered by the Department for Digital, Culture, Media and Sport, towards the costs of audience development consultancy and business planning consultancy
- The Sellafield Social Investment Fund towards the work undertaken by Buttress Architects
- Arts Council England (via the UK Government's Culture Recovery Fund Round 1) to support the costs of the preparation of a Fundraising Strategy
- Sellafield Ltd: a matched grant contribution towards all of the above studies.

1.3 The Carnegie has also benefited from operating budget support from Arts Council England under Rounds 1 and 2 of the Culture Recovery Fund and from Allerdale Borough Council's Covid Business Interruption Funding. We wish to acknowledge the key importance of the funding partners recognition of the case for support that CTT made and of their keen desire to see a transformed Carnegie emerge from this process.

2 Background

2.1 The Carnegie Library and adjoining Lecture Hall were built by Workington Town Council, (WTC) funded by a £7,500 donation by the Scottish-American philanthropist Andrew Carnegie. The building opened to the public in 1904.

2.2 In 1911, WTC purchased an adjoining terraced house which was subsequently gutted to provide an adequate variety stage. The Lecture Hall operated as a cinema until 1958.

2.3 In 1962, the 1,100 seat Opera House in Workington was converted for use as a Bingo Hall, and the local amateur operatic and musical societies needed to find a new home. Although inadequate in terms of dressing room accommodation, the Carnegie 'Theatre' was the only viable option. Some modest improvements were subsequently made in 1963, and the librarian initiated a programme of music events.

2.4 In 1972, the library service transferred to a former Co-operative building on Oxford Street in the town, and WTC made the decision to convert the former library into an Arts Centre. Further improvements were also made to the Theatre, including an extension to the property to provide dressing rooms, new lighting and sound, and a complete refurbishment of the auditorium.

2.5 In 1974, as part of local reorganisation, the ownership of the building transferred from WTC to Allerdale District Council (ADC).

2.6 The Theatre's programme of events was expanded during the 1980s, and Monroe's Bar (a live music venue and occasional studio performance space) was formed in 1985 from what was the former Town Council chamber. The whole of the building was listed as Grade II in 1985.

2.7 Major improvement works to the property commenced in 2008. Most of the roofs were re-slatted and the south facing windows to the upper floors were replaced. Further works were carried out in 2010 when a new flat roof over the existing café area was constructed and like-for-like replacements of the decorative roof lights above the arts centre entrance foyer were installed. The Centre was extensively refurbished to include the re-discovery of the original ceiling in what is now the Dance Studio.

2.8 In 2011, the further development of the Carnegie Theatre and Arts Centre became a priority for the local authority, now Allerdale Borough Council (ABC) and representatives of the local theatrical, dance and musical organisations, along with members of the public, established the Carnegie Development Group, from which a new "Friends of the Carnegie" evolved.

2.9 The Carnegie transferred from Allerdale Borough Council to an independent charitable trust in May 2015 with a principle objective to secure the long term future of the Carnegie by investing in both the Grade II Listed Building and advancing a diverse and accessible cultural and artistic offer alongside the populist theatre programme.

2.10. Since 2015 trustees, staff and a dedicated core of volunteers have carried out a range of projects to maintain and enhance the building to ensure it continues to be a safe and welcoming community facility. This has included major improvements such as installing automated doors into the venue to improve access, improving lighting throughout the venue and at the same time improving energy efficiency, removing all asbestos and rebuilding the stage 'grid' which was in an unsafe condition when the trust took over. The biggest project to date has been the total refurbishment of the main library hall, or cafe as it has now become - reinstating the original 1904 parquet flooring, redecorating and installing a new fit for purpose catering kitchen.

2.11 Alongside improvements to the building The Carnegie steadily increased its programme of events. Alongside a populist theatre programme it continued to make space in the programme for smaller but dedicated audiences that often extend reach in the county. This programme has included lectures, opera and plays. An online ticketing platform and better marketing has helped this process.

2.12 Alongside the Carnegie's traditional programme of events the Carnegie Music Centre has been developed. This is an accredited Arts Awards Centre which offers educational learning of music to children from as young as 8 years old. The Carnegie also offers an Adults Music Centre which includes an adult choir and steel band. The centre is run by three professionally trained music tutors and runs alongside formal educational music teaching where it is available. Over 15 children have successfully achieved their Bronze Arts Award through the centre.

2.13 in 2016, The Carnegie commissioned The Princes Regeneration Trust to explore the progress the Trust had made since it took over the complex and suggest next steps to allow it to fulfil its vision to provide a diverse and accessible range of high quality arts and leisure activities in a welcoming and inspiring environment. This in turn led to work with consultants Sara Hilton and Stephen Anderson of Buttress Architects to assist The Carnegie in developing a long term strategy for the Carnegie. The resulted in an analysis of The Carnegie's strengths, weaknesses, opportunities and threats and from that developed a programme of work to develop a sustainable strategy for the Carnegie which would carve out its future.

2.14 The onset of the Covid-19 pandemic put plans to advance this work on hold. Since March 2020 the Trust has had to devote much of its energies to saving The Carnegie. It had, as most other theatres and cultural venues have, to carry out a redundancy exercise. This reduced its paid staff by 40%, which included the loss of its venue manager post. The staff team were furloughed allowing The Carnegie to take advantage of the Coronavirus Job Retention Scheme with administration and building maintenance falling to volunteers and trustees. While The Carnegie continued to receive the Allerdale Borough Council grant each month, until summer 2021 there was very little other income other than a very low amount of donations. The building re-opened to the public in July 2021.

2.15 During the latter part of 2020, with the building closed, the Trust was able to focus on seeking funding to advance its strategic planning work ahead of re-opening. This resulted in securing grants that have enabled the suite of studies that comprise this project to be commissioned (as set out in paragraph 2.1).

2.16 At the time of transfer Allerdale Borough Council (ABC) agreed to provide Trust with an annual grant of £150,000 which would decline at a rate of £15,000 per year to £0. It was envisaged that The Carnegie would secure further funding to replace the grant alongside enhanced levels of trading income (ticket sales, secondary spends etc.). In the financial year 2021/22 The Carnegie received £60,000 from ABC. This was due to reduce to £45,000 in 2022/23. Unless otherwise amended for 2022/23 or subsequent years, the final year of the agreement will be 2024/25 in which The Carnegie will receive £15,000. The Carnegie receives no other regular grant income.

2.17 In default of any other revenue funding agreement meanwhile between the Trust and ABC, it is expected that the current agreement would novate to the new Cumberland Council, which would then be responsible for meeting the grant payments for the remaining life of the agreement.

3 Strategic Context

3.1 An understanding of The Carnegie’s strategic context is vital to underpin the thinking around the future direction for the Trust. To ensure the success of any future developments and the sustainability of The Carnegie, plans will need to respond to the evidence around the local and regional context, as well as market need and demand. This will enable the Trust to respond to the opportunities that already exist, as well as those that can be seen ahead, while addressing any risks arising from the research.

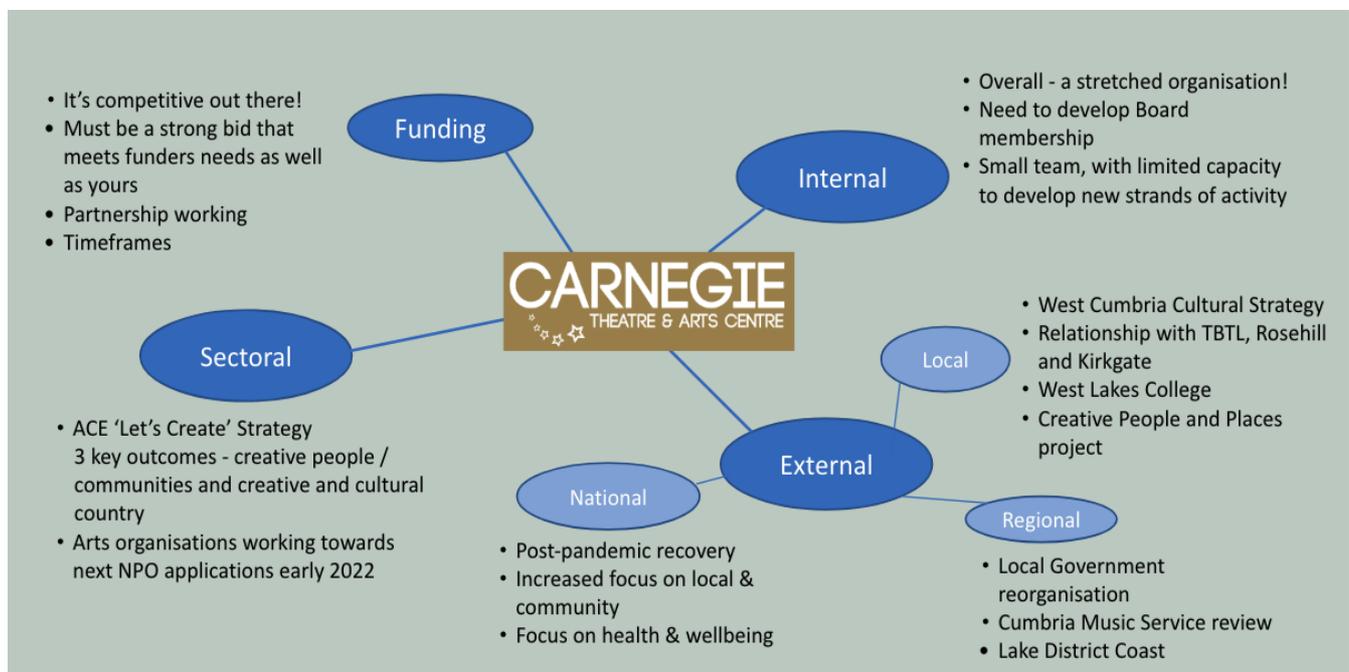
3.2 This section therefore provides an overview of the Theatre’s strategic context. The content has been informed from desk-based research and a number of stakeholder consultations. It does not purport to be a comprehensive review, but it should provide sufficient breadth and depth that it can usefully inform the thinking and decision-making around the future of The Carnegie.

3.3 The collation of content for this overview of the Theatre’s strategic context has been informed by three things:

- **Desk-based research** – review of key strategies and policies, identification of stakeholder organisations and mapping of key themes;
- **Stakeholder consultations** – a series of meetings and phone calls with key stakeholders to further understand the strategic context.
- **Board workshop** – session on strategic context facilitated by Sara Hilton as part of the Board Workshop on 7th October 2021.

3.4 From our engagement to date, it seems that The Carnegie is undertaking its strategic review at an opportune time, with a number of wider initiatives and developments taking place in Cumbria that the Trust can respond to and hopefully capitalise on. But with significant change in the political landscape, with the proposed reorganisation of the local authority boundaries, there is also significant risk and uncertainty within the Theatre’s operating context. The Trust will therefore need to be pragmatic and astute in its navigation of this context over the next few years, using the outcomes of this commission to develop a clear vision and strategy that can inform proactive discussions with external stakeholders.

3.5 An overview of The Carnegie’s strategic context is presented in the visual below, with more detailed information presented in the pages following.



3.6 CT has a challenging internal operating context currently, and while this should not limit the thinking around future direction, these factors will need to be borne in mind when putting in plans in place for taking a new vision and strategy forward. In particular:

- The Trust is still a relatively young organisation, having only been established in 2015. While the Board of Trustees and staff have made great progress in establishing the new charity and running the Theatre

independently from the Council (with financial support on a sliding scale, as discussed in Section Three above. this is an opportune time to reflect on the first years of operation and to hone a new direction for the organisation.

- With a small staff resource, the team are already stretched and there is little capacity to develop new strands of activity. Any new direction will require additional resource to be found, or other elements to be dropped.
- A small Board of Trustees, with one Member who has recently stood down and another who will be leaving at the end of December 2021. Board membership needs to be increased, bringing new skills and additional capacity to support the development of the organisation.

3.7 In relation to the local and sub-regional context, The Carnegie sits in Workington town centre, the largest town within the Allerdale Borough Council (ABC) local authority area and a key hub for West Cumbria. There is a very buoyant strategic context in West Cumbria, with a number of things that will need to be factored into future plans and strategic direction.

Allerdale Borough Council Strategy (2020-30):

3.8 ABC introduced a new 10-year strategy in 2020, with an overall vision of, '*Improving lives and improving futures through sustainable action*¹' (summary [here](#)), with the following objectives:

- A financially secure Council
- A cleaner, greener Allerdale
- Invest to grow
- Outstanding local services
- Thriving towns and villages
- Resilient communities

3.9 The strategy recognises the crucial role of towns and villages at the heart of local communities, and places emphasis on improving the way that places look and feel, as well as supporting towns to adapt to the changing nature of the high street. The strategy also notes that "*town centres offer opportunities to support the creation of resilient communities, contributing to the promotion of healthy, active lifestyles and wellbeing ...*".

Workington Town Investment Plan:

3.10 ABC's Workington Town Investment Plan² (link [here](#)) sets out a vision for Workington to be the hub for all of West Cumbria by 2030, building on the town's assets and setting out areas for intervention around four themes:

- Diversifying the economy and clean growth
- Building an enterprise culture
- Attracting and developing the workforce
- Revitalising Workington

3.11 Whilst The Carnegie has unfortunately not been identified as one of the six priority projects within the Investment Plan, there is significant opportunity for the revitalised Theatre to deliver positively against a number of ABC's priorities and the vision for a revitalised Workington. Not only will it deliver a revitalised cultural asset, but it has the potential to deliver strongly in the areas of well-being, skills development and community resilience.

Local Government Reorganisation:

3.12 As noted in Section Two, in July 2021, the Government announced their proposals for the local government reform that would replace the current two-tier system with unitary authorities to better support the

¹ https://www-cloudfront.allerdale.gov.uk/media/filer_public/85/bc/85bcdbef-d411-40a1-917b-f78cee7248ba/council_strategy_2020_2030_.pdf

² https://www-cloudfront.allerdale.gov.uk/media/filer_public/ef/53/ef53f6b6-f47b-4578-981c-1d69a2a4e530/workington_town_centre_spd.pdf

government's levelling up and devolution agendas. In July 2021, the government announced that it intended to proceed with a two-unitary 'east/west' model for Cumbria. This would mean that Allerdale would join Carlisle and Copeland in forming a new unitary authority for the West Cumbria (Cumberland Council), with Barrow, Eden and South Lakeland forming the second unitary authority. The two new Councils will come into operation in April 2023.

3.13 With one of the main drivers for the local authority reorganisation being cost savings and efficiency, and given the on-going pressure on public sector finances, it seems likely that non-statutory services will be under particular scrutiny in the budget allocations for the new authority. It will therefore be vital that The Carnegie presents a strong evidence base around its role in supporting the vitality of Workington and West Cumbria, as well as supporting delivery around wellbeing, community resilience and town centre regeneration.

West Cumbria:

3.14 The economic and social context of Workington and West Cumbria is well documented elsewhere³, so this section will focus on factors that have a more direct bearing on the future of the Carnegie Theatre.

- Sellafield: with a pivotal role in the economy of West Cumbria and the North West of England, the company have also put significant attention into supporting the area in community development and social enterprise. In July 2020, they relaunched their social impact programme as 'SiX – social impact multiplied', with a £2.2m fund and prioritising projects that are co-curated with communities and stakeholders⁴.
- West Cumbria Cultural Strategy: with support from Arts Council England, Allerdale and Copeland Councils have jointly commissioned Creative Tourist Consults for this work. It is understood that a steering group has been established with local National Portfolio Organisations, with the strategy expected in early 2022.
- Creative People and Places: Allerdale and Copeland have been successful in securing funding from Arts Council England in the latest round of Creative People and Places announcements for support during 2022-25. Working with a number of project partners, with Voluntary Action Cumbria as lead partner, '*From Here to the Future*' will strive to tackle inequalities in cultural participation in West Cumbria, aiming "*to grow participation and support communities to relish all that the arts offer, sharing home-grown to internationally recognised quality arts experiences with dispersed communities, building on current successes and developing new grassroots activities.*"

Cumbria Cultural Context:

Cumbria Creative and Cultural Strategy⁵:

3.15 The Cumbria Local Enterprise Partnership has recognised the importance of creativity and culture to support Cumbria's future economic growth. The strategy focuses on developing Cumbria as 'England's Natural Capital of Culture and Creativity' by delivering on three strategic priorities:

- Creating the Foundations for Creativity and Culture to flourish
- Enabling the Creative and Cultural Sector to grow
- Promoting Cumbria's unique offer to national and international audiences.

3.16 The Strategy goes on to set out five principles that underpin those priorities:

- *Place based* – of and for our people and places
- *Resilient* – creating a sector and organisations that operate on a can do culture
- *Innovative* – people and places that are constantly moving forward

³ See for example 'West Cumbria Opportunities and Challenges 2019, a community needs assessment commissioned by Sellafield Ltd'

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/802498/West-Cumbria-Opportunities-and-Challenges-Feb-19-SINGLES.pdf

⁴ <https://www.gov.uk/government/news/introducing-six-sellafield-ltds-new-social-impact-programme>

⁵ Cumbria Creative and Cultural Strategy can be found at <https://www.thecumbrialep.co.uk/governance-and-accountability/strategy-plans/>

- *Sustainable* – environmentally sensitive, ecologically aware and committed to operating with our unique landscape
- *Enhanced* – wellbeing and quality of life.

Cumbria Music Service:

3.17 The Service is currently recruiting a new CEO and has been the focus of a review in a report jointly commissioned by Arts Council England and Cumbria County Council. With The Carnegie already acting as a music service hub, and with a new CEO coming into the countywide Music Service, this provides a good opportunity to engage with the organisation and explore the potential for Carnegie having an enhanced role within music development provision in the area.

Sectoral:

Arts Council 'Let's Create':

3.18 Wider than the Cumbria cultural context, The Carnegie's strategy will need to respond to the wider cultural environment. The strongest influence for the next decade is likely to be Arts Council England's 'Let's Create' Strategy⁶, which places focus on enabling creativity to flourish in all communities. Sitting alongside this, ACE's Delivery Plan 2021-24⁷ goes on to set how they want to support the sector deliver against three outcomes:

- Creative People
- Cultural Communities
- A Creative and Cultural Country.

3.19 ACE expects to publish details of the application process for organisations wishing to join the new National Portfolio (for revenue support) from April 2023, and current National Portfolio Organisations (NPOs) are firmly focused on developing their new strategies in readiness for their submissions in early 2022.

Cultural funding context:

3.20 The other major influence in the sector is likely to be the increasingly competitive funding environment, which means that organizations are going to have to work much harder at creating really strong bids to be likely of success. Informal conversations with funders suggest that within very competitive funding rounds, there are insufficient funds to support all strong applications.

National context:

3.21 While the stakeholder engagement undertaken for this project has focused on the local and sub-regional context, it is important to set our thinking within a broader national context, with key identified factors as follows:

- **Covid-19 and post-pandemic recovery** – while attention had started to shift to post-pandemic recovery, news of the Omicron variant at the time of writing this report suggest that the challenges with Covid-19 are far from over. This will continue to put significant pressure on the economy, society and the cultural sector.
- **Climate emergency** – increasing focus and need to tackle climate change, improve environmental sustainability and use of sustainable transport, alongside the need to encourage personal and collective responsibility;
- **Environmental sustainability** – linked with the above factor, there is focus on 'building back better', with greater urgency from the government and funders to incorporate sustainable technologies, green infrastructure and sustainable transport;
- **Working culture** – with the radical shift to home-working during the pandemic, it is unlikely that our patterns of working will go back to the pre-pandemic state. Companies are reviewing and reducing their

⁶ <https://www.artscouncil.org.uk/letscreate>

⁷ <https://www.artscouncil.org.uk/lets-create/delivery-plan-2021-2024>

office footprint, encouraging flexible working patterns and enabling a 'blended' approach to working a split pattern between home and office.

- **Health and well-being** – linked to the above point, the challenges of Covid-19 and lockdown life have resulted in greater recognition of the need for healthy work-life balance, along with greater focus on the access to activities to support improved mental and physical health.
- **Connection to green space and the natural environment** – there has been a surge in the population's interest in accessing green space and nature during lockdown. People have appreciated their local green space and lunchtime walks have become a regular activity for many.
- **Economy** – challenging economic context, with a focus on the need for stimulating jobs and growth, particularly across the North;
- **Digital** – online technology and access playing an increasingly significant role in all aspects of business, work and home life, with a number of national programmes and initiatives to develop digital literacy and access across the population. Digital poverty also being recognised as an issue for those without access to the technology, creating further barriers within socio-economically disadvantaged communities;

3.22 There are opportunities for The Carnegie that come from this national context, particularly around the growing focus on healthy work-life balance and health and well-being. While there are opportunities within the national context, however, there are also significant challenges, not least the increasing pressure on public sector budgets and on-going uncertainty with Covid-19.

Stakeholder consultation:

3.23 A number of stakeholder consultations were undertaken as part of this commission. While the outcomes of those conversations have fed into the strategic context above, there were valuable reflections on the Carnegie, its brand, programming and the opportunities which exist for the Theatre's future development.

3.24 This report provides an overview of the key messages that came from the strategic conversations, with further detail to be found on those that related to audience development and potential activities within the 'Audience Development Plan, Consultation Findings'.

3.25 A sample of the quotes around the general reflections from the stakeholder conversations:



Key themes from the stakeholder conversations:

3.26 Drilling down into a bit more detailed on the conversations with stakeholders, key themes are covered split down into two main areas – brand/image and opportunities:

Brand/image:

3.27 Key points are as follows:

- The Carnegie is recognised as an important community venue, but one that has not been punching its weight as a cultural destination for West Cumbria.
- The Carnegie does not have a clear brand or image, with a number of the consultees having a low level of awareness of the programme or offer.
- There were questions around quality of the programme from some, while others recognised that there was a need for a diverse cultural offering for West Cumbria.
- Cultural colleagues mentioned a lack of connection and visibility with the wider Cumbria cultural family.
- Recognition that the Carnegie would benefit from increased engagement with external stakeholders and potential partners to enable conversations to develop around future shared activity and to advocate for the Theatre's role in Workington and West Cumbria.

Opportunities:

3.28 Key points are as follows:

- There is strong potential for a stronger relationship with Rosehill Theatre, Theatre by the Lake, and Kirkgate Theatre
- There is a need for the different venues to develop distinctive but complementary roles, working together to present a rich and varied cultural offering for West Cumbria.
- There may be potential benefit in developing shared services across the venues, for example with joint marketing, shared roles and combined box office.
- There is considered to be strong potential around developing a targeted offer for young people
- The Carnegie is identified as having the potential for an enhanced role around music development, not only providing a varied music programme, but offering talent development and routes into employment and education.
- Strong potential around community arts provision. The Carnegie is already recognised as a valued community asset, with encouragement that this could be further enhanced.
- There is potential opportunity for an application to Arts Council England under their National Lottery Project Grants. This could support a project that would enable The Carnegie to implement some of the recommendations within this report. While there is no guarantee of success, proposals that build on the evidence base within this report should enable a strong application. Keeping the request below £50k and confirmation of match-funding would also enhance the likelihood of success.

Summary:

3.29 The research into the strategic context and the stakeholder conversations present a picture that is dynamic, shifting and uncertain. Within the local government reorganisation during 2022-23, the emerging cultural strategy for West Cumbria, and NPO funding announcements in early 2022, all of these can have potential influence on the Carnegie's future.

3.30 But with that uncertainty comes opportunity, and in many ways the Carnegie is well placed to respond to this shifting context and take a proactive role in advocating for a stronger role for the Theatre within the regeneration of Workington and community-led cultural delivery in the area.

3.31 During the period of this commission, The Carnegie's Chair has already made great progress, with positive conversations with Rosehill and Theatre by the Lake. With the outcomes of this work, followed by the development of a strong brand for the Theatre, that will hopefully enable those early discussions to translate into action to support the delivery of the new vision and strategy.

4 Audience Development Strategy

4.1 The Audience Development Plan has been developed in the context of The Carnegie's re-opening after periods of lockdown arising from the Covid-19 pandemic which has presented the need for many arts and community-based organisations to review and re-vision their future plans.

4.2 The objectives for this work are:

- To prioritise potential audiences for the Carnegie to target
- To deliver knowledge about these key audiences from a consultation programme
- To use the audience insight gathered above to inform the Business Plan and fundraising
- To develop an action plan for The Carnegie board and staff team to deliver.

4.3 The full audience development strategy is provided in Appendix C.

What do we mean by audience development?

4.4 Audience development describes a process of continual, managed activity undertaken specifically to meet the needs of existing and potential audience and to help organisations develop on-going relationships with audiences. By audiences we mean ticket-buyers, visitors to venues, those who engage online on websites and social media, as well as those who support financially, or through their advocacy and influence. So it can include media, funders, partners as well as participants in your programmes and those attending shows.

4.5 The task of developing audiences is best seen as holistic to be delivered across an entire organisation rather than the responsibility of one person or department. It is much more than marketing, relating to programme, facilities management, training and staff development, and the whole experience of visiting a venue (before, during and after).

4.6 Its starting point is to understand your audiences; hence this process has involved significant consultation and research into existing and potential audiences and partners. Developing new audiences is about developing relationships that are two-way – listening and responding. It needs a long-term approach and whilst there are always some quick wins that can make a difference, this needs to be seen as a long-term process, embedded as a way of working across the team.

Consultation and desk research insights

4.7 A wide programme of consultation was delivered over summer 2021 which identified feedback from existing and potential audiences. A series of depth interviews with existing and potential partners identified opportunities for future work as well as helping to position the Carnegie to differentiate from the wider cultural offer in West Cumbria. Desk research into other comparator venues and programmes has added to our thinking in developing approaches to audience development. More detail is found in the body of the report. The key insights from the public consultation are:

- Strong support and passion for seeing the Carnegie succeed
- *"It's nice to be asked for our opinions and to be listened to. I really want to see the Carnegie succeed."* - comment from focus group participant.
- Lack of awareness of what's on and what the Carnegie is about
- *"I want to know what's on well ahead and if it goes out of my head I won't seek it out, I need them to send me information regularly."* – focus group participant
- Lack of appeal in the programme
- *"I want to trust in their quality control"* - focus group participant. (The lack of appeal in the programme and a lack of awareness of what's on together make up a significant 40% of previous attenders and are both areas that can be addressed by the team)
- Real interest in more participation opportunities.

4.8 The key opportunities from the partner consultation are:

- All of the organisations and individuals consulted would be keen to work with the Carnegie to deliver new programmes if funding can be secured and have the attitude that by developing an audience at one venue, all venues will benefit
- Interest in sharing resources where appropriate

- Partnering-up with experienced organisations to deliver engagement projects with new audiences and develop relationships with sectors such as schools
- Potential to learn from the way other venues programme and promote their shows
- West Cumbria has gaps in provision of music participation programmes for young people and adults
- Lack of local infrastructure in West Cumbria to support theatre and performing arts – can this be addressed by working together, e.g. skills training, apprenticeships, support for related businesses

Recommendations

4.9 The insights gained from the consultation, desk research, knowledge of the strategic context, discussions with staff and trustees and experience of the consultancy team have been brought together to inform a set of audience development recommendations for The Carnegie:

- Develop compelling reasons for people to visit and to return with a new programming strategy, participation opportunities, and a holistic approach to delivering a great visitor experience

Consider your target audiences in all of your work and continue to listen to and respond to their needs

- Agree on the Carnegie's mission and values and put these at the heart of your brand development to be delivered consistently across the organisation – live and breathe your values in all of your work
- Empower the staff team to make decisions and invest in capacity to be able to deliver change
- Increase your profile and awareness of your work with the agreed target audiences by investing in communication systems and resource to deliver a marketing plan
- Develop partnerships to access new audiences and explore new ways of working
- Test out new approaches and monitor what works by being more data and target-driven.

Positioning

4.10 The Carnegie is a venue rooted in its locality, at the heart of its community. It offers opportunities for local people to be creative and to develop skills. It supports and inspires local talent but also is a place to relax, to meet and socialise where fun and friendship are valued. The Carnegie offers a warm, inclusive welcome, whatever your background or ability, with a great experience for all. It has a focus on theatre, music and performance and the connections between them.

Target audiences

4.11 The Carnegie should be targeting West Cumbria for its audiences. These have been split into segments which are profiled below. Young people are a key target and we have recognised the need to split this huge group down further:

Young people age 16-25 years

4.12 Young people in this group have a focus on their future career as well as socialising and having fun. They want to build their CVs and explore what's possible, broadening their horizons. This group may be looking beyond the place where they grew up for opportunities, though unsure whether to make that jump. The Carnegie can offer the chance to up-skill close to home, to support emerging talent whether through formal education or as individuals. The team will work with young people to co-create programmes to inspire and entertain young people. The venue will offer spaces to meet and hang out with friends.

Messaging

4.13 We are here for you to develop your skills and explore what's possible in the world of theatre, music and performance. Work with us to discover and create in a place where everyone is welcome and where fun and friendships are valued.

Young people age 11-16 years

4.14 This group will be in formal education and still developing their identity and exploring the world we live in. Friendships and groups are important and the Carnegie will offer programmes that recognise the value in socialising alongside developing confidence and trying out new ideas. Teachers and partners will work closely with the Carnegie team to develop projects that explore music, theatre and performance, and that deliver their needs around Curriculum-rich content that delivers pupil outcomes and increases attainment. School-based projects will be a springboard for individual young people to discover the Carnegie and to progress onto programmes in their free-time to develop their creative and practical skills.

Messaging

4.15 For teachers: we can deliver your learning priorities here in a creative environment. We will work with you to develop creative and practical projects bespoke to your teaching needs.

4.16 For young people: come and learn creative and practical theatre and music skills in a place where everyone is welcome and where fun and friendships are valued.

Children and families, age 5-11 years

4.17 Primary school teachers are looking to work across the Curriculum, basing work on topics and being creative with subjects, and the Carnegie needs to be open and flexible to do the same. Local teachers who are keen to develop projects and longer-term relationships with the Carnegie will be approached to work closely with the team to co-produce programmes. As with the older group, these projects can be a springboard to family programmes that attract local people to participate out of school time.

Messaging

4.18 For teachers: we can deliver your learning priorities here in a creative environment. We will work with you to develop creative and practical projects bespoke to your teaching needs.

4.19 For families: Come have a go at our hands-on activities, learn to play music or theatre skills with others in place where everyone is welcome and where fun and friendship are valued.

Local, entertainment-driven adults

4.20 This group are motivated by opportunities for enjoyment with others, whether in an arts venue or elsewhere. They are looking for entertainment and a good day or night out with atmosphere. This group will be keen to include food and drink in their trip, interested in group offers, party nights, pre- and post-show catering. They have the potential to be – and enjoy being seen as regular attenders if they are offered a thread of consistent programme. Cabaret, singalongs, music and comedy will all be popular, as well as local showcases.

Messaging

4.21 We are the heart of our local community, a place to gather and enjoy good times, where fun and friendship are valued and you can rely on us for great entertainment.

Local creatives and regular art-attenders

4.22 This group are regular attenders at arts and cultural venues and many will be creatives themselves. They already attend a mix of venues across West Cumbria and potentially further afield and are members of mailing lists and hold memberships for different cultural organisations. They may be motivated by self-expression and a wish to gather knowledge, with many interested in participating in programmes at the Carnegie. Some will be seeking something that transports them from their everyday lives, a bit of magic to brighten the week with music or drama. This group will be more motivated by content that has been recommended by trusted names or work by creatives they already know. They may like to test out the new as well as the known names.

4.23 The creatives will be a mix of amateurs and professionals - artists, musicians, writers themselves, looking for inspiration or to share their creativity with others. Some will be keen to perform and work with the Carnegie on their terms as well as be in the audience. Some will want to sign up for participation programmes, developing their skills, being inspired by other local creatives and gaining in confidence, or even lead workshops themselves. There will be groups who can be targeted to take part in these opportunities, whether lifelong learners (e.g. U3A) or networks of musicians/writers/artists/performers, with a range of different abilities and experience levels.

4.24 Potential partners and performers will want to be assured of quality standards at the Carnegie, and a regular programme of project development and building dialogue and relationships with this group will help deliver this consistently across each season.

Messaging

4.25 Join us as we develop new programmes to support and inspire our creative communities in West Cumbria.

Third sector organisations delivering health and wellbeing programmes

4.26 This group includes the NHS, care providers and support networks who work in the health and wellbeing sector and are looking for partners to provide content that can assist them in their work. They want to hear about the benefits that arts and culture can bring to their patients and clients and to work closely with the Carnegie team to develop something bespoke that works for them. This may mean The Carnegie hosts their regular provision in the building and can benefit from new contacts and lively daytime use of the space. Accessibility and flexibility will be vital with support needed from the venue team to deliver a high standard of service. The positive outcomes from this work need to be measured as evidence to secure future programmes and partnerships.

Messaging

4.27 The Carnegie is at the heart of its community and can offer opportunities and access for everyone to explore and enjoy their creativity to deliver health and wellbeing benefits. We are keen to discuss partnerships and looking to work with you to develop new programmes.

Advocates and Influencers

4.28 The Carnegie needs to communicate its values and the fact that it is changing and get the message out there by working with people who will advocate and share that message with others. These are the influencers, people with a platform who are listened to by the audiences we want to target (see above). This may be the media, funders, potential trustees, group and network leaders, high profile people in the arts and creative industries, Headteachers, local business leaders, as well decision-makers in West Cumbria (in politics, Local Government, third and community sector leaders). They want simple, consistent messaging backed up with images, quotes, and evidence of the impact and outcomes that the Carnegie can deliver change. This should connect back to the Carnegie's vision and values and forward strategy, always backing this up and illustrating your positive direction.

Messaging

4.29 The Carnegie is planning for its future, making changes with a view to its sustainability. It is at the heart of its community in West Cumbria, working with partners to support local talent and skills and inspiring creativity in a place that values fun and friendship.

Potential programmes

4.30 The potential opportunities for The Carnegie, when married to its mission and values, suggest that there is value in developing some areas to specialise in to target new audiences and partners:

- Music
- Young people
- Health and wellbeing

The Carnegie team will need significant additional resource to be able to develop and deliver any new programmes, as well as to develop and improve existing ones. The wider consultancy team are recommending that project-based funding is secured which will enable the team to:

- Develop new audiences with new programmes, content, and ways of working

- Learn from and connect with others: Work with partners and bring in external expertise to learn new ways of working and to develop long-term relationships to support delivery and to access new audiences
- Communicate change: Signal to others the change in direction and programme at the Carnegie and encourage others to get involved and support its future
- Demonstrate your ability to deliver for funders and partners.

4.31 An outline of options for each development idea is provided in the full audience development strategy as an illustration for what could be developed. There is a great deal of crossover between the ideas, for instance many music programmes target young people, and many of the ideas have positive outcomes for health and wellbeing and could be delivered with these in mind.

Branding and marketing

4.32 The outcome of the work by JG Creative will post date the completion of the consultancy team's work, but the direction of travel has been set by the guidance offered in the audience development strategy. The financial and people requirements to facilitate implementation of the recommendations from JG Creative will need to be incorporated into the next iteration of the business development process.

5 A New Vision for The Carnegie

5.1 The new vision for The Carnegie is a refinement of that articulated by the Trust in 2020 as it started the process of reviewing its purpose and priorities. The vision has been built on that earlier version in the light of the work the project team has undertaken over the past six months and the dialogue team members have had with trustees, staff and stakeholders. In particular, it has been informed by the audience positioning summarised in Section Four.

5.2 Preamble to the vision:

“No man becomes rich unless he enriches others” Andrew Carnegie

5.3 Vision

The Carnegie, situated between the Lakeland Fells and the Solway Firth, is a venue rooted in its locality, at the heart of its community. It aspires to take a leading role in providing culture that is distinctive in our area, working in partnership with others and offering opportunities for local people to be creative, to enjoy learning and to develop skills. It supports and inspires local talent but also is a place to relax, to meet and socialise where fun and friendship are valued. The Carnegie offers a warm, inclusive welcome, whatever your background or ability, with a great experience for all. It has a focus on theatre, music and performance and the connections between them.

5.4 Aims

In the light of the expanded vision for The Carnegie above, the set of aims similarly articulated by the board in 2020 have been reworked and are now stated as follows:

- Protect the architectural heritage of a much valued Theatre and Arts Centre to ensure longevity of our diverse, creative community in the heart of the town.
- Tell and celebrate The Carnegie's proud history in ways that resonate with the community at whose heart it sits.
- Understand our audiences (current and lapsed) and use them to tell us how best to meet their needs
- Develop creative programmes to deepen community engagement and encourage inclusivity.
- Create learning opportunities which are both inspiring and ambitious that will enrich cultural diversity.

- Provide distinct opportunities for expressions of self by identifying, engaging, developing and nurturing new and emerging talent.
- Offer a welcome and provide community facilities that make The Carnegie a place that known to be part of the social fabric of Workington
- Support long-term sustainability by dynamically engaging in cultural partnerships with other like-minded players across West Cumbria.
-

The 2020 values statement remains unaltered, as below.

We are community focussed, encourage social inclusion, are environmentally responsible and take pride in everything we do.

6 Governance

6.1 A governance review has been undertaken with the Board of Trustees as part of the consultancy team's work. The review was founded on the Code of Good Governance⁸, using the seven principles of good governance to steer the conversations and feedback:

6.2 The review comprised the following:

- Consultation: 1-2-1 confidential calls with five of the six Trustees to explore the issues that the Board was facing: what was working well, what needed to be addressed, how good the governance be strengthened etc.
- Feedback and self-assessment: governance workshop to review the seven principles of good governance, present feedback from the consultation calls, followed by a facilitated self-assessment of how the Board was performing against the seven principles.
- Follow-up support: A further session with the chair and Company Secretary to discuss some of the recommendations in more detail.
- Provision of sample documents to support the Trust in developing the following:
 - Governance Manual
 - Schedule of Policies and Procedures
 - Examples of Board committee structures to support more effective governance through delegated scrutiny of particular areas of activity
 - Sample Terms of Reference for Board committees.

Summary of feedback

6.3 Things that were recognised as working well:

- A good team of Trustees, with good experience in some areas

The Board has increased in size. We now have a team of 9 trustees, some of whom are based remotely, outside of the immediate area. This has significantly increased the skills and experience of the Board in areas such as arts administration, charity management and charity governance and has added to existing HR and financial management skills. Many of the newer trustees bring experience of other trustee or non-executive roles in a variety of areas of business so we are able to take learning from that.

⁸ <https://www.charitygovernancecode.org/en/front-page>

We have decided to undertake a skills assessment of current Trustees to identify whether any further appointments or training are necessary and to assist us with planning for the future. This is underway.

- Everyone is fairly open

This remains the case.

- Trustees rally round to deal with issues as they arise

This remains the case although trustees are cognisant of the need to act as trustees and not managers.

- Staff are starting to attend Board meetings

Staff members now produce reports for and attend the subgroup meetings and CWL Board, where relevant. The aim is for the CTT Board meeting to be a high level approvals body, rather than going into great detail, hence the staff involvement at the subgroup level.

- Good understanding of the basics – risk analysis, Health & Safety and statutory reporting.

These areas are being further bolstered by the recruitment of new trustees, as above.

Areas that were identified for improvement:

6.4 **Strategy vs operation:** there was a perceived lack of clear boundaries between Trustees and officers, with the Board getting too involved in operational detail on occasion. While this had arisen from understandable circumstances and with positive intention, it had caused tension and had diverted Board attention away from strategy and governance oversight at times.

6.5 Both trustees and officers remain aware of this issue and are working hard to avoid it, with trustees delegating to staff whenever possible. There feels to be more of a team approach rather than 'them' and 'us'.

6.6 The increased number of trustees has helped but resources at management level remain limited. There are many discussions about the need to employ an additional FTE but we haven't yet agreed the precise role of that individual or fully understood affordability. There is, of course, the ACE application for a Project Manager on the Music Centre, plus we have others (outside the core team of 3 staff) working on basic marketing/social media and box office admin.

6.7 The forward plans and terms of reference for the meetings should assist in focusing the Board and subgroups at the right level of discussion.

6.8 **Stakeholder engagement:** the Board could play a stronger role in external stakeholder engagement and advocacy. There was recognition that the Board had been focused on internal matters for the first years of the Trust getting established. However, it was now timely to turn attention externally, to build stronger relations with stakeholders and potential partners.

A "Meet the Trustees" event has been organised with hirers / users so we can talk them through where we are as a trust and what our forming plans are. We are planning on doing the same with staff / volunteers but that will be in more detail at a later date. The Chair is leading on developing partnerships with TBTL and Rosehill. A list of stakeholders has been produced for an upcoming fundraising campaign.

6.9 **Financial overview:** while the Treasurer had detailed engagement and understanding of the organisation's finances, other Trustees did not feel that they had good understanding or overview of financial matters.

6.10 Financial oversight and reporting is improving as a result of several initiatives and changes: (i) the dedicated subgroup, (ii) Daniel Marsden taking responsibility for financial matters within the organisation, (iii) the recruitment of a bookkeeper and (iv) the introduction of SAGE.

6.11 The Chair of the subgroup has experience of financial management and has proposed that a competitive tender for auditors is undertaken. Trustees appear to feel more confident in understanding the financial position.

6.12 Work is underway to establish the appropriate amount of restricted reserves to hold and ensuring funds held for different purposes are suitably separate and distinguishable (work has started on this with the setting up of a further bank account in which to deposit fundraised funds). A review is underway of the Financial Controls policy.

6.13 **Separation between the governance of the Charity and Trading Company:** there is a current lack of clear separation between the governance of the two organisations, with overlap between the directors of each and matters being dealt with at the same meetings. This should be addressed as a matter of urgency.

6.14 CTT and CWL Board meetings are now held separately, with a further non-Trustee recruited as a director of CWL (Neil Schofield) and another non-Trustee registering an interest in becoming a director of CWL. A regular meeting schedule has been agreed. The Carnegie is taking advice regarding a services agreement between CTT and CWL, primarily focusing on the split of the financials and any employee chargeback needed. This will document the formalities of separation. All casual staff will transfer from CTT to CWL. The bar part of the business transferred to CWL from 1 April 2022.

6.15 **Establishment of Board committees:** it is recommended that the Board establish a small number of committees to enable more detailed scrutiny. Sara has offered two examples of committee structures for similar organisations, and discussed the potential for committees to cover:

6.16 The CTT Board has established two subgroups: Finance, Risk and Resources, and Buildings, Infrastructure, Operations and HSSE. Terms of reference have been produced for each and approved by the Board. A quarterly schedule of meetings has been agreed. A forward plan has been produced for each subgroup and the Board so the decisions needed can be followed through.

- Finance/Fundraising
- Operations
- Buildings and Health & Safety
- Programming and activities.

6.17 Until the Board increases in size, it may be better to limit the number of committees initially as they will all need to be administered and supported. It is important that the Board recognise that Trustees retain overall responsibility for all matters, with the committees supporting the detailed scrutiny to allow for more effective use of the time at Board meetings. The subgroups do not have delegated powers, instead making recommendations to the Board.

6.18 Other matters considered during the governance review included the following:

- **Review of policies and procedures:** while there has been some good progress on the development of policies for the Trust, there is further work to ensure that all appropriate policies are in place.

Work has been undertaken to assess the existing policies and procedures and map these against the template list of policies and procedures which all charitable organisations would be expected to have. We are not yet in a position to differentiate between CTT and CWL policies and procedures.

- **Decision-making and responsiveness:** some Trustees noted that Covid had highlighted the need for the Board to be able to make decisions more effectively, with a feeling that decisions sometimes got delayed and put back.

This has been helped by the new structure, as outlined in other areas.

- **Reports to support informed decision-making:** the format of reports that come to Board could be improved to support effective decision-making, with clear presentation around the background to the matter being discussed, review of the options under consideration, implications of the recommended course of action, with clear recommendation to the Board for decision.

A template report has been produced and is being used by staff and some trustees when submitting papers to the Board or subgroup. This requires a succinct summary of the issue, a recommendation to note, endorse or approve, and references any risks, HSE or financial implications.

- **On-going review of effectiveness:** the Board should introduce an annual review of performance against the seven pillars of good governance to support on-going improvement.

This has been added to the forward plan to take forward at the end of 2022 when the new trustees and new structure are further embedded.

7 Building Condition, Options and Proposals

7.1 Buttress Architects have developed a condition survey and feasibility appraisal for the Carnegie Theatre, Arts Centre and adjacent annex building.

7.2 The report provides an analysis of existing uses; a capacity, routes and zoning and accessibility.

7.3 Vertical accessibility within the building is poor and the study includes consideration of four location options for lifts to improve this.

7.4 The report includes an analysis of options to improve the use of the buildings and external spaces, including workshop areas; flexible use areas and public realm.

7.5 A range of investment options are considered:

- Option 1 – a range of interventions and improvements £2.84m (incl. VAT)
- Option 2 – intervention required to improve the existing layout of the building and how fundamental elements such as access and WC provision can be improved. It also looks at how the annex can be adapted £2.28m (incl. VAT)
- Option 3 – gives consideration to removing the annex to form a larger external space £1.99m
- Option 4 is the do maximum option £2.99m (incl. VAT)

7.6 A building valuation of the existing property and the four options is also provided.

8 Fundraising Strategy

8.1 117 Consulting was commissioned to prepare a report into fundraising at The Carnegie as part of the overall strategic review project. The aim of the report is to recommend improvements to fundraising The Carnegie.

8.2 Helen Jenkins has worked closely with the Chair of the Board, plus the Board and staff team to develop this strategy. She has also worked alongside a small group of consultants who have built a strategy for a way forward for The Carnegie.

8.3 This strategy has two clear aims:

- To respond to the overall needs identified by the consultant group, staff, and trustees. This means that 117 Consulting has proposed ways to fund specific projects that have been identified as part of the strategic review. This includes potential capital funding and also specific project funding;
- To support and improve revenue fundraising through the development of a fundraising strategy.

8.4 To date there has been no organised approach to fundraising from any source. The Carnegie is reliant on commercial income and also a revenue grant from ABC. Albeit that this revenue grant is on a tapering basis, pre pandemic, fundraising had hitherto not been a priority. In part this reflects the nature of the skills and expertise available within The Carnegie.

8.5 The decreasing grant from ABC means that fundraising will be more important in future years. Also, the ambition to grow and refocus some services requires unrestricted funding. The profit from commercial income will not pay for this development; fundraising will be necessary to fulfil the strategic aims.

8.6 The Board has mixed experience of fundraising; some of the board have experience of submitting grant applications and community fundraising. Others have no experience at all. Again, this is quite typical of many smaller organisations similar to The Carnegie. The Trust needs to play to the strengths of those who have experience and support others with training.

8.7 There is a lot to play for and a lot to win; good fundraising will support The Carnegie's future development and help you to reach your strategic aims.

Barriers to fundraising:

8.8 It goes without saying that there are always a number of barriers to fundraising for any organisation. For The Carnegie there is no lack of enthusiasm and desire to move forwards. The key barrier is of course resources, namely staff time. There is no member of staff who is dedicated to fundraising – this is not unusual in an organisation of The Carnegie's size. However, there is equally no member of staff who is charged with looking after fundraising, stewarding donors, or looking out for new funding opportunities or identifying potentially fundable projects. Again, this is not unusual in an organisation of The Carnegie's size. However, it is important that someone has overall responsibility even if they do not do all the fundraising themselves.

Key recommendations:

8.9 As a priority it is recommended that the Trust (in order of priority):

- Assigns responsibility for different fundraising to specific team members (this could be staff or board);
- Develops a **Case for Support** reflecting the new strategic direction.
- Applies a new focus on **Trusts and Foundations** fundraising for specific projects;
- Improve **contactless and on-site donations**.

8.10 Other key actions include:

- **Internal signage.** Currently there is very little reference to The Carnegie needing funding or it being a charity. Whilst this in itself will not bring donations it is crucial that the message is clear and visible. Develop a message to add internal signage. Also add this message to all print for The Carnegie; the message should be along the lines of 'your donation keeps The Carnegie alive in your community';
- **Whole organisation fundraising.** Ensure that all members of the team are aware that fundraising is critical and needed and part of everyone's role. This can be supported through sharing of figures for fundraising. These should be headline figures such as targets and progress against targets. These figures should also include headline costs. A Case for Support can be used to ensure that everyone is using the same information. This should be done at full staff meetings and volunteer meetings;
- Agree a **Stewardship Plan** to retain and increase current donors. Remember – the best donors are the ones you already have! Someone must be responsible for this. Most usually this is the person who has secured the funding. So, if this is a trust whoever wrote the application should steward the relationship;
- The **CRM** system should be able to support fundraising – for example keeping records of donors/ gift aid declarations/contacts etc.

8.11 When the Trust has had the opportunity to work through the above priorities, then it should then move onto the following:

- Develop a **Membership scheme**;
- Develop more **Corporate Partnerships**.

8.12 The fundraising strategy makes made specific recommendations relating to each of the above priority areas. There are some areas of fundraising which it is not recommended be focused on at this stage. To be successful the Trust needs to have focus; you can raise some money from many sources, but it is much better to focus on the early stages. Areas not to focus on right now are:

- Major donors
- Crowd funding
- Legacy giving
- Community fundraising.

8.13 This does not mean these will not be relevant in the future; any could be. But right now, it is crucial that the Trust focuses whilst it stabilises its position and achieves a deeper local grounding.

Timescales

8.14 Implementation of the recommendations is of course crucial to this strategy being successful. It is recognised that there are many competing pressures on the time of the staff and trustees of The Carnegie. It also acknowledged that everyone involved is keen to maintain momentum and see change happening. With all of these factors in mind a series of prioritised actions have been provided in the full version of the Fundraising Report.