



The Chamberlain Highbury Trust

16 December 2021

Invitation to tender for a fundraiser to work with Chamberlain Highbury Trust

This Invitation to Tender (ITT) is for a Fundraising Consultant to support the Trust Board of the Chamberlain Highbury Trust (CHT) with a major capital appeal on behalf of CHT to raise matched funding of £550,000 to support their application to the National Lottery Heritage Fund for a delivery grant in excess of £3 million in May 2023. This is when the Round 2 application to the National Lottery Heritage Fund will be submitted and by which date at least 90 per cent of the match funding will need to be secured.

Timescale for fundraiser's work with CHT

March 2022 – September 2023 (maximum).

Background

We have received a Round 1 development grant from the National Lottery Heritage Fund, to support our plans to restore Highbury, Joseph Chamberlain's family home in Birmingham.

The Chamberlain Highbury Trust manages Highbury, the Chamberlain family home in Moseley, Birmingham. The mansion is Grade II* listed and the 30 acres of gardens are Grade II listed. Both the mansion and the gardens are also "at risk" registered. Highbury – the mansion and the gardens – needs a lot of work to restore and refurbish the estate.

We have already made a start on some of the much-needed restoration works:

- With the support of Birmingham City Council, we have made the mansion's roof water-proof and weather-proof
- With the support of Historic England, as well as the National Lottery Heritage Fund and Birmingham City Council, we have partly restored the gardens.

Now, the announcement of this new Lottery grant means that the Trustees can start planning for a programme of major improvements over the next four years.

Obtaining funding from the National Lottery Heritage Fund for Highbury's restoration is a two-stage process, the first stage being this Development Grant. The Trust will receive £368,000. This is 59% of the total approved development work cost of £619,000. The Trust has in place the 41% matched funding required to carry out the Development Phase. The second stage is the Round 2 application for funding the Delivery Phase when we will carry out the major restoration works.

A grant for the Delivery Phase from the National Lottery Heritage Fund is not assured but we will be asking for a grant in excess of £3M, which, together with other grants and our own fundraising, makes possible a £7M-plus restoration.

Fundraising undertaken to date

The total cost of the capital project, for both development and delivery costs is £7M - £8M. The CHT intends to apply to the National Lottery Heritage Fund for a Round 2 grant of just over £3M representing approximately 45% of these costs. Funding of £1.9M has already been secured from Birmingham City Council, mostly in support of the Round 2 application.

Other fundraising activity has included:

- A disposal of property from the estate to be agreed with Birmingham City Council and also by the Charity Commission worth £1M
- Producing a fundraising strategy to secure the remaining match funding of £550,000 required to support delivery of the Round 2 restoration project. This focuses primarily on fundraising from grant-awarding bodies, trusts and foundations, engagement with individuals and companies with an interest in heritage and community fundraising
- Working with our four honorary patrons to recruit a new group of patrons willing to donate and to introduce us to other similar donors.

The work to be done

During the Development Phase we must raise further match funding in order to be successful in applying for the much bigger grant for the restoration works themselves. We need the help of a fundraiser in order to raise £550,000 in the next 18 months from a variety of sources, for example Trusts and Foundations, Individuals, Corporates.

We want to welcome modern Birmingham into Highbury. We will continue to build our youth leadership programme and our engagement with neighbouring communities in Kings Heath, Moseley and Stirchley. We will offer opportunities for our neighbours to join us and make use of these beautiful surroundings. We want to support entrepreneurs in our locality to start businesses in a new business hub with flexible use in the currently disused north wing.

We also intend to work to high standards of environmental sustainability. We want to be this generation's custodian of a visitor attraction and working environment that Birmingham can be proud of. These ambitions can only be realised with the support of funding.

Aims of the project

The project's aims are to:

- Restore the fabric of the mansion, make all areas accessible to all visitors and expand our range of activities, especially those around young leadership education and training
- Restore the gardens to a closer representation of what they would have looked like in Chamberlain's day
- Provide appropriate visitor facilities, for example toilets and café
- Set up an enterprise hub in the mansion's north wing for local entrepreneurs especially those who may be starting their own businesses
- Place sustainability at the heart of the design and implementation and work towards net zero in all the works we undertake .

Equality, diversity and inclusion

During the restoration, we will work with contractors to maximise opportunities for apprenticeships and apply clear standards of equality, diversity and inclusion.

When Highbury re-opens fully restored, we will be the employer of a dedicated workforce and we will maximise opportunities for apprenticeships and apply our own high standards of equality, diversity and inclusion.

Audiences

We know we already attract 100,000+ visitors a year. When we completed the first restoration works in the gardens, visitor numbers for the gardens rose by 30 per cent.

We intend to engage with the following priority audiences through the Activity Plan:

- Existing users of the gardens and visitors to the mansion
- Our neighbouring communities, especially in King's Heath, Moseley and Stirchley
- Young people 11-30 from Birmingham and its surrounds interested in taking part in our young leadership education and training programme
- Our volunteers, looking to invest in their development and provide rewarding volunteering opportunities as well as recognised qualifications.

We have good engagement with the Greater Birmingham & Solihull LEP, the Universities of Aston and Birmingham and numerous local schools. We work with many local community groups and charities. We have mapped our stakeholders.

Timetable

The Development Phase (RIBA 1 to 3) will begin in January 2022 and end in mid-2023. By May 2023, we will have submitted a Round 2 application to the National Lottery Heritage Fund. This is to allow time to raise the partnership funding. The capital work of the Delivery Phase will be undertaken during 2024, handover is planned for the end of 2025. The three-year Activity Plan will be delivered from January 2024 to December 2026, initially in the gardens and through outreach, and then utilising the restored mansion and gardens to their full potential. The completion report and summative evaluation will be undertaken during the first quarter of 2027. Other appointments will be procured separately:

- Architect/Lead Design Consultant (inc. co-ordination of design team marked *)
- Client/Technical Project Manager
- Quantity Surveyor
- Structural/Civil Engineer *
- MEP Services Engineer*
- Principal Designer*
- Interpretation & Activity Planner
- Business Planner
- Evaluation Consultant
- Interpretation/Graphic Designers

Scope of work

CHT's Trustees intend to engage a Fundraising Consultant to support their fundraising work to secure £550,000 of matched funding for the restoration project, with at least 90% committed by May 2023.

The scope of works required includes:

- Writing a Case for Support, which will form the basis of all fundraising messaging
- Writing a short script giving a brief overview of the project and the need to raise funds which can be circulated to the CHT's Trustees to support initial approaches to donors
- Producing a shopping list of opportunities for aspects of the project which funders may want to support and, working with the Trustees, identify which potential funders or donors could be approached for which opportunity
- Working with the Trustees to produce a policy on donor acknowledgments
- Working alongside the project manager to meet funding requirements
- Undertaking further research on:
 - ✦ trusts and foundations and grant giving bodies to ensure any applications meet their funding guidelines
 - ✦ individual prospective donors so that the Trustees have full briefing notes on them and their interests prior to a meeting
 - ✦ companies – so that the right approach and proposal can be created to fit with their interests or corporate social responsibility strategy
- Drafting:
 - ✦ applications to trusts and foundations and grant giving bodies
 - ✦ proposals to individuals
 - ✦ proposals to companies
 - ✦ messaging for the campaign
- Working with the Trustees to launch and manage a fundraising campaign to the community
- Supporting the Trustees to devise and deliver events to cultivate and steward donors
- Working with the Trustees to ensure all donors are thanked and acknowledged appropriately
- Attending regular meetings with the Trustees to update on progress.

Targets

The overall fundraising target for the matched funding is £550,000. This is currently broken down as:

- £300,000 in grants from trusts and foundations
- £100,000 from corporate fundraising
- £80,000 from individual major donors
- £70,000 from community fundraising initiatives

Timeline

The contract will run from March 2022 to September 2023 (maximum).

Up to 90% of the fundraising target should be secured by when the CHT intends to submit its Round 2 application. This is planned for the end of May 2023.

Activity	When
Engage Fundraising Consultant	By February 2022
Write Case for Support Produce a shopping list of opportunities for support	February/March 2022
Write script for the project for the Board	March 2022
Draft applications and proposals to funders, undertaking additional research as necessary.	March 2022 – February 2023
Attending meetings with Trustees	From March 2022
Support cultivation and stewarding events	From April 2022 onwards

Person specification

The Fundraising Consultant will have a track record of successful fundraising in the heritage sector. We expect you to have a working knowledge of the different funding options available to the Trust, for example trusts and foundations, grant schemes, the levelling up fund, new and emerging sources of funding around sustainability and renewables, as well as major donors. Experience of creating fundraising campaigns, relationship management and fundraising from corporate donors is also desirable.

The successful person will have exceptional communication skills – both written and verbal, excellent research skills, a strong attention to detail and extensive knowledge of the fundraising market. We want someone who is persuasive and personable, able to maintain relationship with donors and funding managers.

Fee

The budget for the Fundraising Consultant is up to **£22,500 plus VAT** during the Development phase. We expect a minimum of 50 days of support. There is a small budget for fundraising expenses which will be managed by the Trust Board.

Deadline

Completed tenders should be returned **by 4pm on Friday 21 January 2022** to Chamberlain Highbury Trust at Chamberlainhighburytrust@outlook.com

No questions will be accepted after 4pm on 07 January 2022. It is the Tenderer's responsibility to ensure that they are received on time. Clarification interviews (if needed) will be held on or before 14 January 2022.

Tender submissions – please read carefully

The purpose of the tender response is to enable CHT’s Trust Board to evaluate your understanding of our requirements, the suitability of your proposed approach and experience and skills of your team. Your response should consist of the following:

- A written response to the evaluation criteria below.
 - a. Ensure your responses relate to the project brief.
 - b. Do not include generic information. Any general marketing material about your company or additional appendices that have not been requested will not be considered.
- A priced offer in the format requested.
 - c. It is the Tenderer’s responsibility to ensure all fees, rates and prices quoted are correct. Tenderers will be required to hold these or withdraw their tender in the event of errors being identified after the submission of tenders.
 - d. If a Tenderer fails to provide fully for the requirements of the specification in the tender it must either absorb the costs of meeting the full requirements of the specification within its tendered price or withdraw the tender.
 - e. No tender will be considered which is late, for whatever reason nor will changes be permitted after the closing date.
 - f. All tenderers shall keep their respective Forms of Tender valid and open for acceptance by the Trust Board or 90 days from receipt.
- Signatures of appropriately authorised individuals e.g. where the tender is a Limited Company, by a Director; where it is a Partnership, by two authorised partners or by an individual if they are a sole trader. Signatures can be scanned.
- Evidence of appropriate insurances. All consultants should have Public and Professional Liability and Companies Employer’s Liability if they have employees.

Evaluation criteria

Tenders will be evaluated according to the following criteria¹:

CONTENT	%
Methodology/approach	30
Relevant experience of fundraising:	
In the heritage sector	15
From trusts and foundations	15
From major donors	10
From Companies	5
From community campaigning	5
Understanding of our project	10
Value for money	10
TOTAL PERCENTAGE	100

¹ The Trust Board will assess Tenderers’ responses according to these criteria and will award points up to the maximum shown against each heading in the Quality evaluation assessment table below. Failure to achieve a rating of satisfactory (i.e. a minimum unweighted score of 3 or above) in any one or more categories may result in the bid being disqualified at the Trust Board’s discretion.

Quality evaluation assessment

Assessment Criteria	Score
Unacceptable: either no answer is provided, or the answer fails to demonstrate that any of the CHT's key requirements in the area being measured will be delivered.	0
Poor: fails to demonstrate how the CHT's basic requirements in the area being measured will be addressed, giving rise to serious concerns that acceptable outcomes would not be delivered against the project brief.	1
Weak: barely demonstrates how the CHT's basic requirements in the area being measured will be addressed, giving rise to concerns whether acceptable outcomes would be delivered against the project brief.	2
Satisfactory: demonstrates how the CHT's basic requirements in the area being measured will be addressed so as to deliver acceptable outcomes against the project brief.	3
Good: demonstrates how most of the CHT's requirements in the area being measured will be addressed so as to deliver good outcomes against the project brief.	4
Excellent: demonstrates clearly how all of the CHT's requirements in the area being measured will be fully addressed so as to deliver excellent outcomes against the project brief.	5

Please note the following:

Preparation of Tender

Tenderers are responsible for obtaining all information necessary for the preparation of their response; and all costs, expenses and liabilities incurred in connection with the preparation and submission of the Tender and attending any interviews will be borne by the Tenderer.

The Tenderer is expected to have carried out all research, investigations and enquiries which can reasonably be carried out and to have satisfied itself as to the nature, extent, and character of the requirements of the Contract (in the context of and as it is described in the Specification), the extent of the materials and equipment which may be required and any other matter which may affect its Form of Tender.

Tenderers may seek clarification on any of the points contained in the tender documents at any time **up to 4.00PM on 07 January 2022**. This will allow time for the Trustees or Project Manager to prepare a response to all tenderers by seven days before the tender deadline and for all tenderers to incorporate the clarification prior to the tender deadline.

Non-consideration of Form of Tender

CHT's Trust Board reserves the right not to award the contract to the highest scoring, lowest priced or to any tenderer; and also reserves the right to accept any of the same in whole or in part.

The Trust Board may also refrain from considering any Form of Tender if it is not in accordance with the Form and Conditions of Tender, or the Tenderer does not provide all of the information required or attempts to make variation or alterations to the Form of Tender, Conditions of Contract or the Specification.

Tenderer's Warranties

In submitting a Tender, the Tenderer warrants that:

1. It has not done any of the acts in the Non-Consideration of Form or Tender,
2. All information provided is true, complete and accurate in all respects including details of previous projects being presented as examples,
3. It has full power and authority to enter into the Contract.
4. It is of sound financial standing, and
5. Its partners, directors and employees are not aware of any circumstances that may adversely affect such financial standing in the future.

Confidentiality

The Form of Tender, the Conditions of Contract, the Specification, and all other documentation or information issued by CHT's Trust Board relating to the Tender shall be treated by the Tenderer as private and confidential for use only in connection with the Tender and any resulting contract and shall not be disclosed in whole or in part to any third party without the prior written consent of the Trust Board.

The documents which constitute the project and all copies thereof are and shall remain the property of the CHT (whether or not the Trust Board shall have charged a fee for the supply of such documents) and must not be copied or reproduced in whole or in part and must be returned to the Trust Board upon their request.

All information provided by tenderers as part of a tender return will be treated as confidential.

Submission of tender

Please send your tender to Chamberlain Highbury Trust at Chamberlainhighburytrust@outlook.com

We must receive from you, by 4pm on Friday 21 January 2022:

- **A written tender in response to our Invitation to Tender**
- **Your CV no longer than 2 pages A4**
- **Two references from clients for whom you have raised at least £350,000.**

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 ChamberlainHighburyTrust
 The Chamberlain Highbury Trust
 www.chamberlainhighburytrust.co.uk
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