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Redevelopment of Cleveland Pools, Bath - Fundraiser Consultant Brief

Cleveland Pools Trust Ltd

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Revision History

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Date	Revision No.	Prepared By	Authorised By
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Appendix A - Project Organogram

Appendix B - Project Programme

1.0 Purpose of Document

This document sets out the project background scope of services and duties and deliverables for the procurement of the fundraiser consultant.

2.0 Background

The Cleveland Pools Trust Ltd have received a funding award from HLF to develop the exciting project of re-opening the existing outdoor Georgian bathing Pool in Bath, which was originally built in 1815. The site is listed grade II* and is part of the Bath World Heritage Site. The site was last used for swimming in the mid 1980's and is thought to be the oldest purpose designed Lido in the UK, possibly Europe. The project has evolved from the efforts of a committed local group who have fought to bring the site back into use as a naturally water treated open air swimming facility to serve the local community, adding a new dimension to Baths tourist offer away from the core of the City.

The Cleveland Pools Trust seeks an experienced and well qualified professional fundraiser to develop and manage its programme to raise £450k partnership funding between January and October 2016. The funds will go towards a £3.7m stage II grant from the Heritage Lottery Fund earmarked towards the restoration of the Cleveland Pools site as an open air, naturally water treated community swimming pool. The total project cost is currently estimated to be £4.3m. Around £150k funding has already been secured as pledges or cash donations.

Historical background to the project can be found on the trusts website at http://www.clevelandpools.org.uk/background-1/.

3.0 Scope of Services

The Fundraiser will be required to liaise closely with the established project team (see Appendix A - Organogram), project director and trustees to devise and co-ordinate all fundraising activities. The Fundraiser will report to the Project Director, and through the trusts Fundraising, PR and Marketing working group guiding and supporting their work. The group includes highly motivated and experienced volunteers who have already submitted over 84 funding applications to major grant giving trusts. Given this baseline the likely focus of the post will be on developing and cultivating opportunities major gifts, individual and corporate giving.

4.0 Duties and Deliverables

A project team has been established and is working towards submission of a stage II HLF application in August 2016. The fundraiser will be responsible for ensuring that the £450k partnership funding is secured as cash or firm pledges no later than November 2016 prior to the HLF's grant decision.

The project programme envisages initial designs and costings being chosen through a public consultation period around late March. Planning applications for the final design being submitted in 28th May 2016. The stage II application will be submitted by 7th October 2016

The duties and final scope of the post can be developed through applying the experience of the post holder, once he/she fully understand the background and needs of the project. It is envisaged that tasks will include:

- Familiarisation with the history and aims of the project up to current day activity
- Understanding the current fund raising activity, and resources available to create a realistic timed action plan, identifying key priorities and the most effective way to manage the resources, trustees and volunteers to deliver the plan.
- Ensure that the programme of funding activity links seamlessly with the main project programme planning initiatives to commence when design and costings for the project are available, currently anticipated March/April (see programme), advising the design team well in advance for the need of various types of images, plans and costings for publicity and presentations.

- To co-ordinate the Fundraising, PR and Marketing group keeping minutes and a list of agreed actions
- Establish an appeal board to identify key prospects to open doors
- To use established local knowledge and conduct research to identify a contact list of prospects, personally managing and developing positive relationships with them to raise significant sums.
- Promote donor recognition of gifts in an appropriate way in conjunction with the rest of the project team
- To create a crowd funding programme to secure remaining funding required at the most appropriate time
- To supply summary reports of progress to the Project Board on a monthly basis and HLF on a quarterly basis with a clear fund raising strategy and funding forecast at the HLF project review stage scheduled for 27th May 2016. All final stage II submission documents are required to be in draft form at this point and the quality of these will determine whether the HLF allow the project to proceed to make a stage II submission.
- To help create systems, policies and procedures for long term fundraising and develop a culture and framework within the Trust that understands the need and process required to sustain fundraising activities into the future in association with the business and activity planner.

5.0 Budget

It is envisaged that the fee for this commission will be in the region of: $\pounds 15 - 20k$

6.0 **Project Programme**

Please see Appendix B for the current project programme.

7.0 Instructions to Tenderers

7.1 Key Skills Required for the Fundraiser Role

Key skills required for Fundraiser role			Desirable
1.	Available to start work in Jan 2016	Х	
2.	Demonstrable experience of having devised and run successful fundraising campaigns of at least £500k involving personal development of strong relationships with HNW individual contacts, Corporate sponsors, major applications to funding trusts	Х	
3.	Experience of devising and running successful crowd funding campaigns		Х
4.	Excellent verbal and written communication skills, able to prepare quality presentations and deliver them to large and varied audiences and individuals with confidence	Х	
5.	Ability to develop strong relationships with potential donors from a variety of backgrounds, major companies, HNW individual's and general public	Х	
6.	Current member of recognised Fundraising professional body		Х
7.	Demonstrable knowledge of Bath and local area networking and contacts that would be likely to benefit the Cleveland Pools project		Х
8.	Ability work effectively as an individual without an employer supplied office base	Х	
9.	Experience of planning and managing the work of others including volunteers and Trustees	Х	



10.	Up to date knowledge of grant and funding opportunities within Heritage, sustainable energy, community development areas	Х	
11.	Ability to work under pressure, prioritise own work in order to meet deadlines	Х	
12.	Interest in swimming and heritage		Х
13.	Demonstrate an aptitude with experience of planning a small campaign, recording and maintaining up to date records using Microsoft Office, Access, Excel, Word.	Х	

7.2 Tender Instructions

You are required to submit a copy of your CV and explanation on no more than 2 sides of A4 sheets of how you feel your experience matches the requirements of the post. If selected for interview you will be expected to outline an overview of your strategy to achieve the objective, along with any associated budget requirements. The available budget for this work subject to HLF approval is approximately $\pounds 15 - 20k$. Should you feel this is insufficient to achieve the task required you should clearly set out what additional budget you feel is essential to cover specific work packages. You should also include an indicative budget to cover:

• Production of necessary publicity and fundraising materials

The successful applicant will be appointed under the CIC Consultants' Conditions 2nd Edition on a fixed term from January 2016 - November 2016.

The trust currently has no office so home working will be required.

8.0 Scoring

8.1 Breakdown

Tenders will be marked on a Quality:Cost ratio of Quality 40%:Cost 40%:Interview 20%.

This will ensure that the successful applicant will be able to provide the right services for a fair price.

8.2 Interview:

If you meet the essential criteria, are shortlisted and invited for interview. You will be required to give a 10 minute presentation outlining your experience in planning and implementing successful fundraising projects. You must also set out a suggested programme to demonstrate how you would intend to raise the funds required by November 2016

Tender Submissions must be made by 5 PM on Friday 22nd January 2016 and emailed to christopher@clevelandpools.org.uk.

The interview date will be February 1st 2016.

Appointment will be made by February 2nd 2016.



Appendices



Appendix A - Project Organogram



Initial Draft Management Structure 11/3/15

Funds Available for:

- Water Hygiene Research £8,916
- Flood Risk Assessment £8,916
- Green Travel Plan £8,916
- Access £8,916
- Conservation Management Plan £18,000
- Interpretation Advice £15,000
- Activity Plan £12,000
- Accountancy Advice £5,000
- Community & Public Engagement £5,000
- Fundraising Advice £5,000
- Disability Access Assessment £2,000
- Catering Advice £2,000
- Trustees Governance costs £2,000
- Specialist VAT advice £1,300
- Insurances £5,000
- Pilot Activities £24,000
- Contingency £42,000



Appendix B - Project Programme

ID Task Name	Duration Start Finish	October November December	Develoral Pools Trust Programme Ianuary February March Aoril Mary June July Ausust Seatember October November Decemb
1 Stage 1 - Preparation	278 days Thu 28/05/15 Tue 28/06/16	201000 05/10 12/10 19/10 26/10 02/11 09/11 16/11 23/11 30/11 07/12 14/12 21/12 28	January February March Jany Jany
2 Finalise Procurement Strategy	7 days Thu 28/05/15 Fri 05/06/15		
3 Finalise Vision for the Project Meeting with HLF Project Monitor	7 days Thu 28/05/15 Fri 05/06/15 1 day Thu 04/06/15 Thu 04/06/15		
5 Project Board Meeting	1 day Mon 08/06/15 Mon 08/06/15		
6 Consultant Procurement 7 Procure Architect	278 days Thu 28/05/15 Tue 28/06/16 48 days Tue 02/06/15 Thu 06/08/15		
Procure Mechanical and Electrical Engineer Procure Quantity Surveyor	43 days Tue 23/06/15 Thu 20/08/15 43 days Tue 23/06/15 Thu 20/08/15		
28 Interpritation & Activity Plan 31 Business Plan	190 days Tue 29/09/15 Tue 28/06/16	<u> </u>	
32 Submit Brief to HLF 33 HLF Comments	0 days Tue 29/09/15 Tue 29/09/15 4 wks Tue 29/09/15 Mon 26/10/15	29/09	
34 Issue Brief 35 Tender Period	2 days Tue 27/10/15 Wed 28/10/15 4 wks Thu 01/10/15 Wed 28/10/15		
36 Appointment	4 wks Thu 29/10/15 Wed 25/11/15		
Review the Business Case of Key Elements Site Visit	4 wks Thu 10/12/15 Thu 14/01/16 1 day Fri 15/01/16 Fri 15/01/16		
39 Draft Visitor / User Projections 40 Development of Financial Model 41 Output from Activity Consultation	14 days Mon 18/01/16 Thu 04/02/16 4 wks Fri 15/01/16 Thu 11/02/16 1 day Fri 12/02/16 Fri 12/02/16		
A1 Output from Activity Consultation A2 Review Visitor/User projections and Financial Model Risk Assessment/Monitoring & Evaluation Framework / Organisation	2 wks Mon 15/02/16 Fri 26/02/16		
Kisk Assessment/Monitoring & Evaluation Framework / Organisation Hold workshop to discuss Business Plan Issue Draft Business Plan	1 day Mon 29/02/16 Pri 04/03/16 1 day Mon 07/03/16 Mon 07/03/16 16 days Tue 08/03/16 Tue 29/03/16		
46 Issue Final Business Plan 7 Preoare Natural Filter Feasibility Study	13 wks Wed 30/03/16 Tue 28/06/16 4 wks Fri 07/08/15 Thu 03/09/15		
48 Review Project Feasibility 49 Procure Pools Specialist	1 wk Thu 28/05/15 Wed 03/06/15		
49 Flocure Pools speciality 50 Submit HLF Filter Report 51 HLF Approval	1 day Fri 02/10/15 Fri 02/10/15 1 wk Mon 05/10/15 Fri 09/10/15		
52 Prepare Tender Documents 53 Tender Period	2 wks Mon 12/10/15 Fri 23/10/15 3 wks Mon 26/10/15 Fri 13/11/15		
54 Assessment Period 55 Interview	1 wk Mon 16/11/15 Fri 20/11/15 1 day Mon 23/11/15 Mon 23/11/15		
56 Recommend Appointment to HLF 57 Appoint Pools Specialist	1 day Tue 24/11/15 Tue 24/11/15 3 days Wed 25/11/15 Fri 27/11/15		
58 Investigation Works 59 Topographical Survey	140 days Mon 14/09/15 Mon 04/04/16 3 wks Mon 14/09/15 Fri 02/10/15		
60 Desktop Site Investigation 61 Tender Site Investigation	2 wks Mon 05/10/15 Fri 16/10/15 2 wks Mon 09/11/15 Fri 20/11/15		
62 Site works for Site Investigation 63 Labs and Report 64 Assessment of Swimming Pool	3 wks Mon 14/12/15 Mon 11/01/16 6 wks Tue 12/01/16 Mon 22/02/16 2 wks Tue 23/02/16 Mon 07/03/16	=======================================	
64 Assessment of swimming Pool 65 Swimming Pool Condition Survey 66 Party Wall and Pool Lease	2 wks Tue 23/02/16 Mon 07/03/16 4 wks Tue 08/03/16 Mon 04/04/16 163 days Mon 18/01/16 Thu 01/09/16		
60 Party Wall and Pool Lease 67 Party Wall Meeting with Council 68 Party Wall Survey	163 days Mon 18/01/16 Hu 01/05/16 1 day Mon 18/01/16 Mon 18/01/16 4 wks Tue 19/01/16 Mon 15/02/16		
Farty wail survey Farty wail survey Resolution of Pool Lease Resolution of Pool Lease Resolution of Pool Lease	0 days Thu 01/09/16 Thu 01/09/16 255 days Fri 04/09/15 Fri 02/09/16		
71 Prepare Conservation Plan 72 Meet with English Heritage to review CPM	6 wks Fri 04/09/15 Thu 15/10/15 1 day Mon 11/01/16 Mon 11/01/16		
72 Meet with English Heritage to review CPM 73 Complete Final CPM 74 CPM to inform preferred option	1 day Mon 11/01/16 Mon 11/01/16 2 wks Tue 12/01/16 Mon 25/01/16 0 wks Tue 26/01/16 Tue 26/01/16		
75 Activity Plan 76 Review Existing Material, Conpile Stakeholder List and Consultation Sch	208 days Tue 10/11/15 Fri 02/09/16		
77 Consultation period 1 78 Output from consultations to inform preferred option	18 days Mon 04/01/16 Wed 27/01/16 0 days Wed 27/01/16 Wed 27/01/16		
79 Consultation period continued 80 Draft Activity Plan	4 wks Thu 28/01/16 Wed 24/02/16 4 wks Thu 25/02/16 Wed 23/03/16		
81 Governance 1st Draft 82 Input for HLF meeting	4 days Thu 24/03/16 Tue 29/03/16 2 wks Wed 30/03/16 Tue 12/04/16		
83 Consultation 2 84 Draft 2	4 wks Mon 30/05/16 Fri 24/06/16 3 wks Mon 27/06/16 Fri 15/07/16		
85 All physical works required for planning 86 Finalise Interpretation Plan 87 Sign Off	3 wks Mon 18/07/16 Fri 05/08/16 3 wks Mon 08/08/16 Fri 26/08/16 1 wk Mon 29/08/16 Fri 02/09/16		
88 Carry out Ecological Survey and Flood Assessment	6 wks Fri 04/09/15 Thu 15/10/15		
89 Interpretation Plan 90 Programme and Risk Register	197 days Mon 02/11/15 Wed 10/08/16 4 days Mon 02/11/15 Thu 05/11/15		
91 Interpretation Planning and Creative Workshop 92 Storyline Research	1 day Fri 13/11/15 Fri 13/11/15 3 wks Thu 04/02/16 Wed 24/02/16		
93 Author Draft Interpretation Plan and Issue to Client 94 Feedback Meeting 95 IM in house creative brainstorm December	2 wks Thu 25/02/16 Wed 09/03/16 1 day Thu 10/03/16 Thu 10/03/16 4 days Fri 11/03/16 Wed 16/03/16		
96 Designs 97 Cost for Draft Scheme	5 days Fri 25/03/16 Thu 31/03/16 1 wk Fri 01/04/16 Thu 07/04/16		
98 Issue Draft Concept Design 99 Client Meeting - present draft report (RIBA 2) and initial client feedback	1 day Fri 08/04/16 Fri 08/04/16		
100 Formative Evaluation Consultation Period 101 Input for HLF meeting	3 wks Mon 25/04/16 Fri 13/05/16 1 wk Fri 20/05/16 Thu 26/05/16		
102 Amend Designs 103 Author Draft Scheme Design Report	1 wk Mon 30/05/16 Fri 03/06/16 1 wk Mon 06/06/16 Fri 10/06/16		
104 Add final costings and issue draft Scheme Design 105 Client Meeting - present Draft Report (RIBA 3) and Initial Client Feedbac			
106 Author Final Scheme Design Plan and Issue to client (RIBA 3) 107 Client Approval and Signoff 108 Concect Design	1 day Fri 05/08/16 Fri 05/08/16 1 day Wed 10/08/16 Wed 10/08/16 68 days Thu 28/01/16 Mon 02/05/16		
Concept Design 109 Finalise Options based on Consultant Input 110 Recommend Preferred Option to Project Board	Image: 1 mu 2a/01/16 Micro 02/03/16 1 wk Thu 28/01/16 Wed 03/02/16 0 days Thu 04/02/16 Thu 04/02/16		
Recommend Preterred Option to Project Board Project Board to Select Option Meet Heritage England and Planners to Discuss Selected Option	1 day Mon 08/02/16 Mon 08/02/16 1 day Tue 09/02/16 Tue 09/02/16		
113 Draft Concept Design based on chosen option	6 wks Wed 10/02/16 Tue 22/03/16		
114 Consultation with general punlic, English Heritage and HLF (Pre-appro 115 Preparation for Consultation 116 Hold Consultation Meetings	wai 17 days Wed 23/03/16 Thu 14/04/16 2 wks Wed 23/03/16 Tue 05/04/16 1 wk Wed 06/04/16 Tue 12/04/16		
117 Processing feedback from consultation 118 Final Concept Design	2 days Wed 13/04/16 Thu 14/04/16 1 wk Fri 15/04/16 Thu 21/04/16		
119 QS Concept Design Costs 120 Client Review and Sign Off	2 days Fri 22/04/16 Mon 25/04/16 1 wk Tue 26/04/16 Mon 02/05/16		
120 Client Review and agn on 121 Prepare for HLF Meeting 122 Mid Term HLF Meeting	1 wk Tue 03/05/16 Mon 09/05/16 1 day Fri 27/05/16 Fri 27/05/16		
122 Mid Term HL-Meeting 123 Fundraising 124 Issue Fundraiser Brief	1 day Fri 27/05/16 Fri 27/05/16 176 days Tue 22/12/15 Wed 31/08/16 1 day Tue 22/12/15 Tue 22/12/15		
125 Tender Period 126 Assessment Period	17 days Wed 23/12/15 Fri 22/01/16 1 wk Mon 25/01/16 Fri 29/01/16		
127 Interview 128 Appointment	1 day Mon 01/02/16 Mon 01/02/16 1 day Tue 02/02/16 Tue 02/02/16		
129 Develop Fundraising Strategy 130 Consultations and Presentation to High Net Worth Induviduals	6 wks Wed 03/02/16 Tue 15/03/16 5 wks Wed 16/03/16 Tue 19/04/16		
131 Develop Relationships for constributions 132 Develop Crowdfunding Platform 23 1000000000000000000000000000000000	8 wks Wed 20/04/16 Tue 14/06/16 10 wks Wed 30/03/16 Tue 07/06/16 1 day Wed 08/05/15 Wed 08/05/15		
133 Launch Crowdfunding Website 134 Manage Crowdfunding Website 135 BIBA State 3 - Daueloned Design	1 day Wed 08/06/16 Wed 08/06/16 12 wks Thu 09/06/16 Wed 31/08/16 82 days Tue 03/05/16 Wed 24/08/16		
135 RIBA Stage 3 - Developed Design 136 Prepare Developed Design	8 wks Tue 03/05/16 Mon 27/06/16		
137 Developed Design Costs 138 Review Developed Design with Stakeholders	1 wk Tue 28/06/16 Mon 04/07/16 1 wk Tue 05/07/16 Mon 11/07/16		│
139 End Design Stage 140 Prepare End Stage Report	10 days Thu 11/08/16 Wed 24/08/16 1 wk Thu 11/08/16 Wed 17/08/16		
141 Project Board Approval 142 Prepare Project Evaluation Plan	1 wk Thu 18/08/16 Wed 24/08/16 2 wks Tue 12/07/16 Mon 25/07/16		┃
142 Prepare Project Evaluation Plan 143 Trust to resolve lease for site 144 Carbon Footprint Analysis by Architect	2 wks Tue 12/07/16 Mon 25/07/16 0 days Fri 04/09/15 Fri 04/09/15 1 wk Tue 28/06/16 Mon 04/07/16		
Carbon Poolymit Analysis by Architect Planning and Listed Building Consent 145 HLF Round 2 Submission	12 wks Thu 28/05/15 Wed 19/08/15 100 days Thu 25/08/16 Wed 11/01/17		
HLP Round 2 Submission 147 HLF Round 2 Bid Preparation 148 Submission of HLF Round 2 Bid	31 days Thu 25/08/16 Wed 11/01/17 31 days Thu 25/08/16 Thu 06/10/16 2 days Fri 07/10/16 Mon 10/10/16		↓
Augustation Period RIBA Stage 4 - Technical Design	67 days Tue 11/10/16 Wed 11/01/17 66 days Thu 12/01/17 Thu 13/04/17		
151 Review Developed Design 152 Prepare Technical design	1 wk Thu 12/01/17 Wed 18/01/17 12 wks Thu 19/01/17 Wed 12/04/17		
153 Stage 2 Tender Period	7 wks Thu 23/02/17 Wed 12/04/17		
154 Contractor Selection Tender 155 Prepare Tender Documents	41 days Thu 16/02/17 Thu 13/04/17 1 wk Thu 16/02/17 Wed 22/02/17		
156 Issue Contractor ITT 157 Assess Tender Returns	3 wks Thu 23/02/17 Wed 15/03/17 1 wk Thu 16/03/17 Wed 22/03/17		
158 Contractor Interviews	1 wk Thu 23/03/17 Wed 29/03/17		
160 Appoint Contractor	1 day Thu 30/03/17 Thu 30/03/17 2 wks Fri 31/03/17 Thu 13/04/17		
161 Stage 5 - Delivery	185 days Fri 14/04/17 Thu 28/12/17		
			Page 1