



Redevelopment of Cleveland Pools, Bath - Fundraiser Consultant Brief

Cleveland Pools Trust Ltd

Revision History

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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: £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	Essential	Desirable
1. Available to start work in Jan 2016	X	
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	X	
3. Experience of devising and running successful crowd funding campaigns		X
4. Excellent verbal and written communication skills, able to prepare quality presentations and deliver them to large and varied audiences and individuals with confidence	X	
5. Ability to develop strong relationships with potential donors from a variety of backgrounds, major companies, HNW individual's and general public	X	
6. Current member of recognised Fundraising professional body		X
7. Demonstrable knowledge of Bath and local area networking and contacts that would be likely to benefit the Cleveland Pools project		X
8. Ability work effectively as an individual without an employer supplied office base	X	
9. Experience of planning and managing the work of others including volunteers and Trustees	X	

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

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 £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

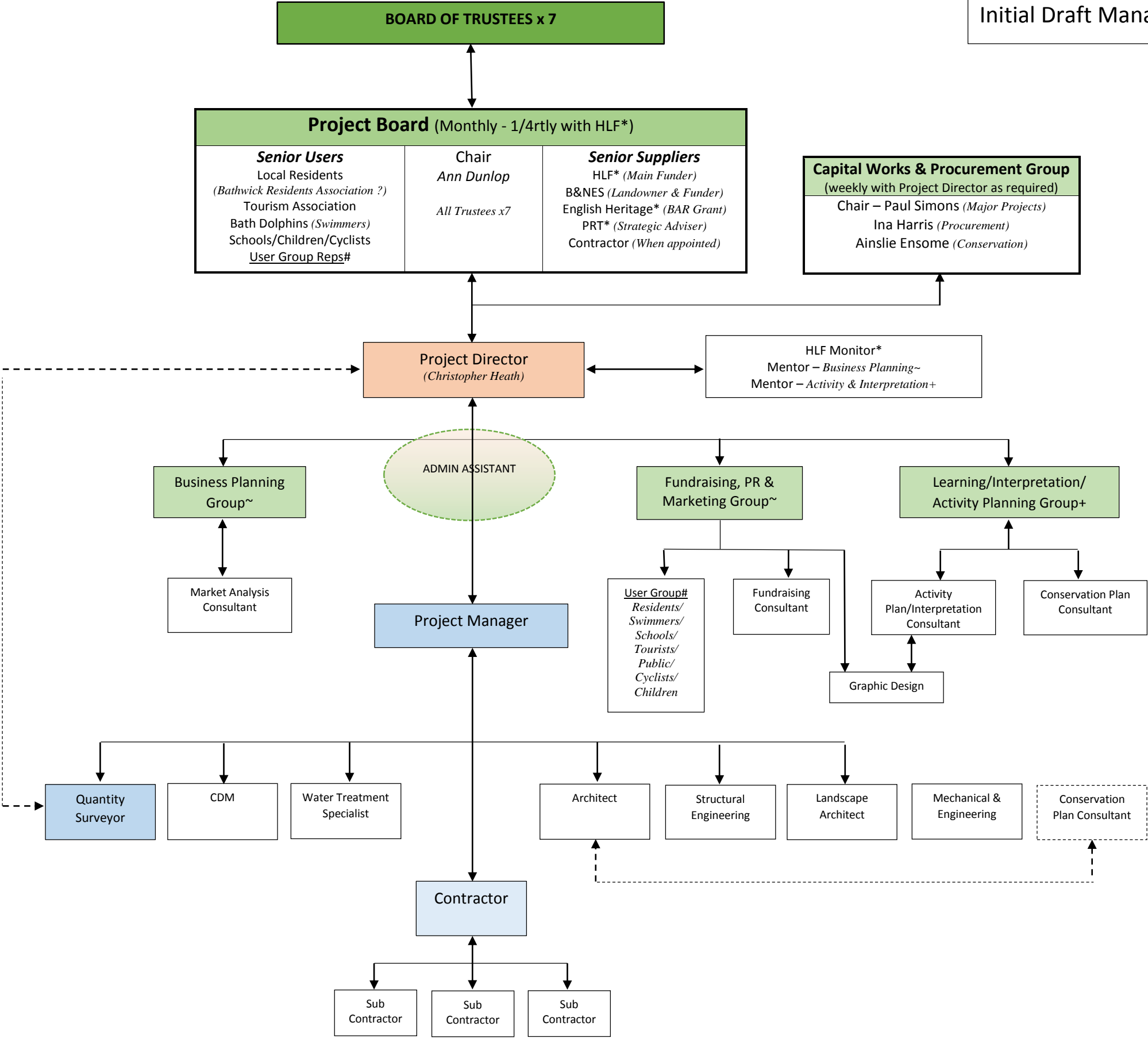
Tender Submissions must be made by 5 PM on Friday 22nd January 2016 and emailed to christopher@clevelandpools.org.uk.

The interview date will be February 1st 2016.

Appointment will be made by February 2nd 2016.

Appendices

Appendix A - Project Organogram



- 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

