

INVITATION TO TENDER: FUNDRAISING STRATEGY DEVELOPMENT

**DEADLINE FOR SUBMISSION OF PROPOSALS:
17:00, FRIDAY 22 SEPTEMBER 2017**

1 BACKGROUND

- 1.1 As the UK Government's national archive for England, Wales and the United Kingdom, [The National Archives](#) (TNA) is the guardian of more than 1,000 years of the nation's records. Our site at Kew is open to everyone, for free. Some of the UK's most iconic national documents are held by TNA, including the Domesday Book and the Magna Carta. Each year we provide access to such historical documents to millions of people globally, both online and in person at Kew.
- 1.2 Over the next few years, TNA will deliver an ambitious transformation programme that will see us redeveloping our site in Kew and creating engagement opportunities for new audiences on site, online and around the country. This transformation, as part of our future strategy '[Archives Inspire](#)', will require significant investment beyond our government settlement, and we are therefore actively seeking major funding opportunities.
- 1.3 We recently commissioned a fundraising feasibility study to assess whether it might be possible for us to raise around £5,000,000 in philanthropic gifts and grants. The study concluded that potential funders were keen to consider supporting us, provided that we established an independent charitable body to oversee our fundraising activity. As a public-funded body, fundraising on this scale is new to us, and ensuring that commitment to partnership funding is in place is crucial to our future plans.

2 THE REQUIREMENT

- 2.1 TNA wishes to appoint a supplier to provide strategic fundraising support, helping us to establish a charitable body through which we can pursue major funding opportunities. The supplier will be expected to help identify and recruit trustees for the charity, and to advise and mentor TNA in fundraising activities.
- 2.2 The supplier will be expected to provide strategic advice and support, to include, but not necessarily be limited to:
- Developing a campaign plan
 - Identifying and recruiting trustees for the newly formed charitable body
 - Compiling lists of high net worth individual prospects, and beginning the cultivation process as appropriate
 - Training and mentoring trustees and staff in fundraising best practice, including the development of a cultivation programme
 - Carrying out additional research into potential grant-making sources.
- 2.3 Potential suppliers should note that the maximum available budget for this assignment is £20,000 (**including** VAT), inclusive of all travel and subsistence costs. The contract will be valid until 31 March 2018, by which date the work will need to have been completed.

3 HOW TO RESPOND

- 5.1 If you have any clarification questions related to your response, please submit these to procurement@nationalarchives.gsi.gov.uk by midday on 6 September 2017.
- 5.2 Please submit your response to procurement@nationalarchives.gsi.gov.uk by 17:00 on 22 September 2017.
- 5.3 It is for you to determine what format your submission should take so as to describe your offer in a clear, comprehensive and convincing fashion; however, you should note that the information you supply may be used, in whole or in part, to populate the Contract Schedules. As such, please make clear and unambiguous statements about the commitments you are making.
- 5.4 Your response should include the following as a minimum:
- 5.4.1 Your **understanding** of the requirement and an **explanation** of your proposed approaches and methodologies to fulfil the requirement;
- 5.4.2 Details of your **expertise and relevant experience**, including **case studies** of similar work;
- 5.4.3 Details of the **designated team members** who will deliver this project, including evidence of recent relevant experience;
- 5.4.4 A brief explanation of how you would allocate the available **budget** to prioritise and deliver against our objectives.
- 5.5 Submissions will be evaluated as follows:
- Quality of response (80%)
 - Price (20%)

4 CONTRACT

- 4.1 The contract will be awarded under our [standard terms and conditions](#).
- 4.2 Please note that the information you supply in your response may be used, in whole or in part, to populate the contract. As such, please make clear and unambiguous statements about the commitments you are making.
- 4.3 TNA reserves the right, at its sole discretion, not to appoint and to achieve the outcomes of the project through other methods.

5 PROCUREMENT TIMETABLE

Ref.	Description	Date(s)
1	Deadline for Potential Suppliers to submit clarification questions to procurement@nationalarchives.gsi.gov.uk	Midday, Wednesday 6 September 2017
2	Deadline for TNA to respond to clarification questions*	Wednesday 13 September 2017
3	Deadline for Potential Suppliers to submit their tender responses to procurement@nationalarchives.gsi.gov.uk	17:00, Friday 22 September 2017
4	Deadline for TNA to evaluate tender responses and identify preferred Supplier	Thursday 28 September 2017
5	Contract award	Friday 29 September 2017

**Any clarification question that TNA deems to be relevant to more than one Potential Supplier will be shared with all Potential Supplier*