**BRIEF FOR FREELANCE FUNDRAISER**

The Historic Chapels Trust is seeking an experienced freelance fundraising professional who has a proven track record of planning, sourcing, authoring and winning funding bids. Although the primary focus will be on Trusts and Foundations and public sources of funding, at a later stage the role will also need to manage HCT donors and supporters.

This is a fixed term contract to 31 March 2020 with possible annual extensions for two further years. A budget of c£30,000, inclusive of VAT and all travel and expenses, is available for this role to deliver the brief set out below in this current year. Extensions may be negotiated based on submitted tender information.

**Background**

The Historic Chapels Trust (HCT) is the only charity caring for highly significant Nonconformist and Catholic churches, chapels and meeting houses, currently with 20 such sites in its portfolio. All are listed Grade I or II\*. HCT operates only in England. For more information visit [www.hct.org.uk](http://www.hct.org.uk)

For a number of years HCT has relied on a single major public funder, Historic England, the grant from which will end in 2022. The current public funding environment is challenging and Trustees now wish to recruit a fundraising consultant to secure additional multi-year funding from other sources. The target is to raise a minimum of £40,000 in the current financial year (to March 2020) and a **minimum** £100,000 per annum by 2022.

HCT currently has a supporter base of c400 (paying in the region of £30) and c10 Patrons paying £1,000 per year. Some renew via Standing Order, others donate when requested.

**Tasks**

* Develop a Case for Support for the Historic Chapels Trust (within 3 months of appointment)
* Investigate and identify potential funders (as noted above) to provide multi-year funding
* Develop a 3 year funding plan - initial applications to be submitted within 6 months of appointment
* Prepare a clear script for high level funding discussions by HCT Trustees and provide individualised recommendations and advice in preparation for meetings and engagements
* Write and submit funding bids and deliver presentations to potential funders as required. Manage day to day interaction with potential and confirmed funders
* Make recommendations for sustainability and strategies in response to the funding landscape
* Support HCT Trustees in building and sustaining good strategic relationships with funders
* Manage supporter and Patron renewals

**Person spec**

The successful person will have strong attention to detail, exceptional research and writing skills, extensive knowledge of the fundraising market, existing connections to funders and be able to work with a wide range of audiences. You will also have a good understanding of General Data Protection Regulation, particularly in reference to holding information on individual members, and ensuring consent for this and for contacting them.

**Tender**

Please provide a tender for the work to include:

* itemisation of elements set out in the pricing schedule
* your CV/company profile setting out your relevant experience for this work
* any perceived risks and challenges and how these might be mitigated

**Pricing schedule**

|  |  |  |  |
| --- | --- | --- | --- |
| Item | Number of days | Per day rate | Total |
| Develop Case for Support |  |  |  |
| Develop 3 year funding plan, and script/aide memoire for Trustees in meeting funders |  |  |  |
| Identify funders, write and submit bids incl presentations |  |  |  |
| Support Trustees and make recommendations for sustainability  |  |  |  |
| Manage ongoing Supporter and Patron renewals |  |  |  |

Please submit your tender information by the required deadline to:

Sarah Robinson

Historic Chapels Trust

c/o Society Building

8 All Saints Street

London N1 9RL

**Timescale**

|  |  |  |
| --- | --- | --- |
| Deadline for responses | Date | 9 September 2019 (noon) |
| Evaluation of responses | Date | By 11 September 2019 |
| Interviews | Date | Mid to end September 2019 |
| Contract award | Date | End September 2019 |
| Contract period | Start | 1 October 2019 |
| End | 31 March 2020 |
| Deadline for delivery of Case for Support  | Date | 1 November 2019 |
| Deadline for 3-year funding plan and script | Date | 1 December 2019 |
| Deadline for delivery of first tranche of bids | Date | End January 2019 |
| Deadline for recommendations for sustainability | Date | 31 March 2020 |

**Tender evaluation:**

All submitted tenders will be evaluated on the basis of the scoring template attached, appendix 1.

**Contract:**

The contract will be CCT’s consultant contract template.

August 2019

Appendix 1: Tender evaluation template

**HCT Freelance Fundraiser – Tender Evaluation**

|  |  |  |  |
| --- | --- | --- | --- |
|  |  | **HCT score** | **Max score** |
| Name: |  |  |  |
| Name of organisation (if relevant): |  |  |  |
| Business address:  |  |  |  |
| Phone No.: |  |  |  |
| Email: |  |  |  |
| Website (if relevant):  |  |  |  |
| **Qualifications:** |  |  | **5** |
| **Relevant Experience:**  |  |  |  |
| (i)Planning and sourcing funding opportunities – Trusts and Foundations and public funding |  |  | **10** |
| (ii) Making applications |  |  | **10** |
| (iii) Success with bids and value:  |  |  | **10** |
| (iv) Supporters/Patron scheme |  |  | **5** |
| (v) Working knowledge of GDPR |  |  | **5** |
| **Cost (budget £30k) \*** | **No of days**  | **Per day rate** | **Total**  |  |  |
| Develop Case for Support |  |  |  |  | **5** |
| Develop 3 year funding plan, and script/aid memoir for Trustees in meeting funders |  |  |  |  | **5** |
| Identify funders, write and submit bids incl presentations |  |  |  |  | **5** |
| Managing ongoing supporter and Patron renewals |  |  |  |  | **5** |
| Support Trustees and make recommendations for sustainability  |  |  |  |  | **5** |
| **Ability to deliver within timeframe:** |  |  |  |  | **5** |
| **TOTAL**  |  |  |  |  | **75** |

**\*** Pricing will be scored on the basis of whether tenderers have understood the requirement, what they are providing, how realistic the time allocation (and subsequent cost) is and whether it is considered achievable