



Bath Royal Literary &
Scientific Institution
1824–2024

INVITATION TO TENDER

For a
Fundraising & Donations Development Project
CONTRACT

RETURN DATE

End of day
28th June 2024



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Bath Royal Literary & Scientific Institution Invitation to Tender

Purpose of Tender: Develop the fundraising and donations proposition at the Bath Royal Literary & Scientific Institution.

Outline of Tender: BRLSI is not capitalising on the collection of donations or legacies. We need help to develop a compelling proposition that clearly explains why funds are required and what the organisation can achieve with increased contributions.

The successful tender will bring experience and knowledge of increasing revenues for charity through the development and implementation of a successful legacies and donations projects.

This contract is intended to run over a 3 to 6 month period. There is flexibility in start dates and duration of the project. The work will initially provide recommendations for enhancements and then roll out this new approach with our team as a pilot project.

Return of Tender:

Please submit your response by email to: james.hamilton@brlsi.org
to arrive no later than 5pm on 28th June 2024

Information for Tenderers

- 1) Donations and legacies are already an important, but not large, part of BRLSI's income streams – circa £30,000 in 2022/23. However, the approach to generate donations and legacies is passive and amateur in nature.
- 2) In previous decades the level of these was much greater and our 'members' were a prime source. However, over time the nature and make-up of our membership has changed in nature; from being mainly drawn from volunteers and supporters to now being members of our audience who wish to purchase a 'season ticket' to our talks.
- 3) Additionally, the Chief Executive of a major UK Museum who visited BRLSI last year highlighted to us that there were opportunities for us to be better in our development of Legacies and Donations to underpin our longer term resilience with a new income stream.
- 4) This tender is for a professional contractor to:

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- a) Review our current approach to raising donations and legacies undertaking brief research as needed to improve our knowledge of opportunities;
 - b) To set out recommendations for how our approach can be enhanced;
 - c) To identify target groups and feed into our membership and audience management systems work to highlight management information needed to maximise donations and legacies;
 - d) Develop a range of online and offline propositions that can be used to attract donations and legacies so that these increase by at least £20,000 pa;
 - e) To develop our relevant online and other related resources and work with our web contractor as needed;
 - f) Over a three month period to work with our staff and volunteers on a pilot campaign to test the above propositions to attract donations and legacies;
 - g) To train the staff and / or volunteers as needed and produce a guidance note on approaches to be followed in future;
 - h) Advise BRLSI on additional fundraising opportunities, such as applying to Trusts / Foundations or Benefactors and provide guidance on how to approach these projects.

Requirements of the submission

5) Your proposal should include:

- Approach to the project
- Methodologies used – including how it is proposed to incorporate [Digital guidance for projects | The National Lottery Heritage Fund](#). in digital resources and content and how it is proposed to embed environmental sustainability in the work proposed;
- CVs of individual(s) highlighting key competencies around areas such as workforce management, recruitment and retention of volunteers and their training
- Track record in the form of examples of similar projects you have delivered in the past 3 years.
- Two client references
- A fixed fee showing the daily rate and expenses, basis of invoicing and whether or not you charge VAT
- Projected timescale for when you would deliver the various requirements and outputs

6) The individual/s or organisation will have existing knowledge, expertise and experience in developing charity fundraising schemes.

7) Contract details

a) We expect this work to begin in September 2024 and be complete by early 2025. The anticipated budget exclusive of VAT (if applicable) is £10,000. There is flexibility in terms of timing.

b) We anticipate the work could be undertaken remotely or from our building in Queen Square, if preferred. Regular visits and travel in and around Bath will be needed. Progress meetings with the Steering group will be held via Zoom.

c) The primary contacts for the overall project will be **James Hamilton**, General Manager and **Chris Garcia**, BRLSI Director of Fundraising.

Tender assessment

8) BRLSI reserves the right to make an appointment based on written submissions or invite one or more tenderers to an interview. Criteria for assessment will be:

- Technical capacity to meet the both elements of the brief (i.e. recommendations and roll out of the new approach)-30%
- A proven track record /experience/knowledge in delivering similar work – 30%
- Value for money – 40%

9) Tender process with likely dates:

Advertise brief - upload to our website and circulate (also post on Art Jobs and SW Fed website)	7 th June 2024
Closing date for receipt of tenders	28 th June 2024
Shortlisting and interview process	8 th July 2024
Notify successful tender, issue contracts & reference checks	15 th July 2024
Begin the contracted work	September 2024 (Flexible)