



LOTTERY FUNDED

## INVITATION TO TENDER

Fundraising Consultant

### Brief

December 2013

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## OUTLINE

Birmingham Conservation Trust, a building preservation trust, wishes to appoint a fundraising consultant to help the Trust develop and implement a business engagement strategy. The strategy will not be limited to fundraising but will cover the variety of ways that the Trust could benefit from business engagement and support. The successful applicant will have extensive experience of corporate giving and CSR, preferably in Birmingham, and knowledge of the heritage sector.

The position is offered at a fixed fee of £7,750, including expenses. The project is funded by the HLF, and the consultant's work must be completed by end June 2014, although implementation of the business engagement strategy will be on going.

Tenders must be returned by 12 noon on Friday 17<sup>th</sup> January 2014.

## BACKGROUND

### **BIRMINGHAM CONSERVATION TRUST** ([www.birminghamconservationtrust.org](http://www.birminghamconservationtrust.org))

Birmingham Conservation Trust is a charity which exists 'to preserve and enhance Birmingham's threatened architectural heritage and to promote an enjoyment and understanding of the City's historic buildings'. Founded in 1978, Birmingham Conservation Trust is one of over 250 building preservation trusts in the UK.

The Trust has two paid staff, a full-time Director and a part-time Development Officer. We have 40 registered, active volunteers.

We repair and conserve historic buildings, and help and advise others on historic building conservation and interpretation. Through events, talks and social media we promote enjoyment and understanding of the historic environment. Through events, activities (particularly with schools) and a volunteer programme we actively engage people with Birmingham's historic environment. Our work is primarily funded through grants and consultancy fees, although we are striving to diversify our funding sources.

Birmingham has a rich and diverse architectural heritage, from remarkable medieval survivals, through Victorian civic grandeur and beyond. Particularly important is the city's industrial heritage, including localities such as the Jewellery Quarter. A challenge in Birmingham is finding new uses for redundant industrial buildings that are both sympathetic and viable.

The BCT is distinctive in devoting particular attention to buildings that were ordinary in their day but have been made extraordinary by the passage of time. A recent major project, the award-winning Back to Backs, rescued an example of a type of workers' housing that was once very common but had otherwise been swept away. For the BCT, the stories that buildings such as

these have to tell about the lives of ordinary Brummies are as important as the buildings themselves.

This approach is captured in our current project, the Newman Brothers coffin fittings works (HLF-funded). This is a relatively ordinary, medium-sized late Victorian factory that produced coffin fittings, coffin linings and shrouds. What makes it extraordinary is the in situ survival of the machinery, fittings, stock, office paperwork etc. - a sort of mercantile Marie Celeste. The Trust will give the Coffin Works new life as a heritage attraction, vivified by the stories of those who worked there (many captured on film). The sustainability of the venture is underwritten by converting other parts of the factory into workshop/office units to let, aimed mainly at start-up businesses in the creative and heritage sectors. The BCT will relocate its own offices to one of these units, greatly increasing the possibilities for community engagement.

## **THE HLF-FUNDED PROJECT**

The consultancy work forms the major element of an HLF-funded project entitled: *Birmingham Conservation Trust: Building a Business Engagement Strategy*.

### **Project Summary**

BCT is in a period of transition. We are moving out from under the wing of local government and in 2014 will have our own premises in an historic factory, the Coffin Works, run a heritage attraction and become a landlord. This is a move into new territory but has the aim of broadening income streams and facilitating much better and more diverse community engagement.

In parallel the Trust has strengthened its board through adopting a systematic and strategic approach to the appointment of new trustees. We have developed a dynamic social media strategy with a lively website, Facebook page, Twitter feeds and on-line fundraising; grown a carefully-designed volunteering programme; and very recently launched a Supporters Group.

The missing piece is serious engagement with Birmingham's businesses. A consultant will help us devise and implement a business engagement strategy. The strategy will not be limited to fundraising but will cover the variety of ways that the Trust could benefit from business engagement and support. The strategy will feed into the development of an integrated business plan for the Trust.

## **THE BRIEF**

Working closely with the Trust's Director, the consultant will develop a 'business engagement strategy' for the Birmingham Conservation Trust, targeting Birmingham-based businesses.

While the primary goal is to secure financial support from the business community, the Director and Trustees recognise that much more can be gained than simply funding. Hence a broader business engagement strategy is proposed that will explore how 'in kind' support, both goods and expertise, can be utilised. For example, as the Trust moves to becoming a landlord for the first time, expertise by way of legal advice or help to find suitable tenants, might be supplied by a company from the business community more easily than a financial gift.

Crucially, the strategy will recognise that good relationships are a two-way process in which the BCT will engage with, and respond to, the needs of the business community, to create mutually beneficial relationships.

The consultant will take the principal role in carrying out two main tasks:

1. devising the business engagement strategy
2. managing the initial implementation steps

It is envisaged that the strategy will be long-term and implemented over a number of years.

In the research phase the consultant will:

- carry out a review of the current level and status of existing corporate relationships
- carry out a resources study to ascertain the willingness of the corporate sector to engage with the work of the BCT
- identify suitable businesses to target: there is a huge property sector in the city (developers, surveyors, estate agents, etc.)
- establish the levels and routes into business via trustees, volunteers, etc.
- develop an understanding of the CSR requirements of businesses operating in the city and apply this to the work of the BCT
- identify approaches to engage businesses, including creating one-off experiences and longer-term projects
- develop an understanding of the Trust's capacity to handle, manage and develop corporate volunteering packages
- advise the Board of Trustees accordingly on a route forward

The HLF grant will also be used to:

- provide staff cover to free up time for the Director to work on the strategy and begin its implementation in conjunction with the consultant
- cover the travel costs of the Director to undertake up to three research visits to other building preservation trusts to identify ways of engaging businesses

In the implementation phase, the consultant will in collaboration with the Director:

- draft the business engagement strategy for the Birmingham Conservation Trust
- agree a number of initial pitches to secure corporate partners reflecting key areas of involvement
- write appropriate text for the Trust's website encouraging corporate engagement
- devise an action plan for implementation
- draw up a timetable for delivery
- identify the key milestones to be achieved
- agree a budget required for effective implementation
- carry out a briefing session for those Trustees and other volunteers who will be involved in supporting the work, to ensure that they understand the principles of corporate engagement

## **PERSON SPECIFICATION**

The successful applicant will have:

- significant experience (at least ten years) in raising funds
- experience of developing corporate giving strategies, with a successful record of having secured and developed corporate partnerships
- have secured substantial corporate gifts of a value of more than £10,000 per time; corporate sponsorship; gifts in kind and other corporate initiatives
- an understanding of, and demonstrable experience in creating, volunteering partnerships involving corporate partners
- an understanding of heritage fundraising
- good presentation and communication skills
- ability to work at many levels - office or shop floor to boardroom

## **Qualifications**

Essential: Membership of the Institute of Fundraising

## **WHAT TO RETURN WITH YOUR TENDER**

1. A statement of how you will approach fulfilling the brief
2. A statement of what you will provide, in terms of your time and other resources, within the fixed fee of £7,750
3. A full CV which explicitly addresses all the points listed in the Person Specification
4. A statement of why this commission should be given to you, and what special knowledge and skills you will bring to it.
5. Suggested terms of payment

Tenders will be scored on the basis of your response to 1-4, equally weighted (25% each).

## **QUERIES**

For queries or an informal chat about the commission, please contact Simon Buteux, Director, Birmingham Conservation Trust. Tel: 0121 303 2664 Mob: 07973 498013 Email: [simon.a.buteux@birmingham.gov.uk](mailto:simon.a.buteux@birmingham.gov.uk) Please note that the Trust's office will be closed from Monday 23<sup>rd</sup> December until Friday 3<sup>rd</sup> January.

## **SUBMISSION OF TENDERS**

Tenders must be submitted by email, as Word or PDF attachments not exceeding 10Mb, to [simon.a.buteux@birmingham.gov.uk](mailto:simon.a.buteux@birmingham.gov.uk) not later than 12 noon on Friday 17th January 2014.