

# **Trust Transition Project**

## **Taking the Past into the Future: Stonehenge and Avebury World Heritage Site**

### **Strategic Plan & Fundraising Strategy**

Brief and  
Request for Quotation



## BRIEF

### 1. Objective

The objective of the 'Taking the Past into the Future' Trust Transition Project is to create a Stonehenge, Avebury and Associated Sites World Heritage Site (WHS) governance structure and fundraising model that will sustain it into the future. The project is funded by the National Lottery Heritage Fund with a completion date of 31 March 2025.

The consultant appointed will work with the Stonehenge and Avebury World Heritage Site Partnership to produce the key strategic documents required to support the development and progression of the Stonehenge and Avebury World Heritage Site Trust.

This work will result in a Strategic Plan to define the organisation's future direction and a Fundraising Strategy for projects arising from the WHS's Management Plan<sup>1</sup>. Both documents should support preparation and future decision on transfer of the WHS Coordination Unit staff and WHS Management Plan into the Charity at an appropriate stage, potentially within two years of charity being operational.

The charity will operate alongside existing charities and organisations that oversee a range of activity within the World Heritage Site, such as visitor operations and conservation, including English Heritage Trust at Stonehenge and the National Trust at Avebury and the wider WHS landscape.

### 2. Outputs

The consultant appointed will produce the following outputs to support the development and progression of the Stonehenge and Avebury World Heritage Site Trust:

#### Output 1: Strategic Plan

This activity requires a professional to develop a document that:

- Captures the primary purpose and aims of the charity for the next 3 – 5 years.
- Records how the charity will operate including management and governance structures, decision making and operations and how the Trust will operate with the existing partnership governance arrangement and structure.
- Details activity to be delivered within the plan, and how this will be funded and monitored.
- Conducts a SWOT Analysis, including but not limited to the identification of internal weaknesses and external threats.
- Includes risk analysis.
- Includes financial forecasting.
- Considers costs and evaluation criteria for potential future transition of staff and WHS Management Plan into the charity as a Feasibility Study or similar.

#### Additional information:

- Please include in your application proposals for how the above would be delivered and any additional key components that you would recommend for inclusion within this work.

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<sup>1</sup> [Stonehenge and Avebury WHS Management Plan 2015](#)

## Output 2: Fundraising Strategy

This activity requires a fundraising professional to produce an effective 3-year fundraising strategy that will allow a phased but sustainable organisational growth, drawing on a range of fundraising streams.

Areas covered should include the following and will be developed and confirmed upon appointment:

- Analysis of fundraising: current sources
- Fundraising needed: defined by Strategic Plan and key WHS Management Plan themes
- Fundraising case for support: narrative for potential funders
- Analysis of funding climate and areas of work most likely to achieve funding
- Feasibility study of potential income streams including corporate and personal donations, legacies and grants
- Targets (financial & non-financial)
- Infrastructure required to support fundraising eg staffing, Board, consultancy support in key areas.
- Fundraising budget
- Action Plan

### Additional information:

- Implementation of the Fundraising Strategy is not included within the scope of this brief.
- If bid writing and other fundraising activity is a service you provide, please include as a line additional to your quote as a day-rate.

## Output 3: Trustee & Staff Training

Skills development and capacity building is an important outcome for our NLHF grant and the future success of the charity. Working with the consultant to deliver this brief is seen as an Action Learning Exercise for members of the partnership, Trustees and WHS Coordination Unit staff.

There is also opportunity within the project to hold a Trustee and staff workshop to develop skills to support the delivery of the Strategic Plan and Fundraising Strategy.

Please include within your application costs for a half day workshop with a description of the skill/s or knowledge development proposed.

### Additional information:

- Some suggested training topics include marketing and audience engagement to support fundraising activity, however we would welcome your suggestions on subjects that support the development of the charity.

## 3. Project timescale and Budget

Work will take place August – November 2024.

The anticipated budget for this work is up to £14,000 with proposal applications evaluated based on criteria at Part 7.

#### 4. Communication and Consultation

The consultant will work closely with the WHS Partnership Manager (WHS Coordination Unit), with outputs developed in consultation with the CIO Working Group and Trustees and agreed by the Trust Transition Board.

Most aspects of this work can be undertaken virtually. When required, in person meetings will take place in Wiltshire and will be arranged by the WHS Coordination Unit.

#### 5. Proposal content and format

Please submit a project proposal which must include:

- Completed Request for Quotation form.
- A fixed fee proposal (with and without VAT) for each output of the brief with a proposed schedule for payment.  
Please specify:
  - the number of days worked
  - include provision for basic expenses for up to 3 meetings in Wiltshire
- Please also include a standalone day-rate for any subsequent additional activity that arises additional to this brief and basic expenses for meetings in Wiltshire.
- An outline methodology and timetable for completing key tasks and indicative start date with consideration of resource restrictions within the project timescale.
- Relevant skills and experience for the project.
- At least two similar projects who could be contacted as references,
- Insurance details: Professional Indemnity and Public Liability,

#### 6. Skills and Expertise

Essential

- A proven track record of delivering similar work.
- Experience of working with senior stakeholders across a range of local and national organisations.
- Excellent communication and facilitation skills.
- Ability to provide clear advice in situations with complex partner relationships.
- Experience and knowledge of working in the heritage or environmental sector.
- Experience of delivering training / skills development sessions.

#### 7. Quotation process

- Proposal submissions are required within 2 weeks of request for quotation and should arrive no later than **Monday 29 July 2024, 5pm**. Any documentation arriving after this time will not be accepted.
- Submissions will be reviewed by the CIO Working Group and appointment agreed by the Trust Transition Board, with a decision made within 2 weeks with supply of full Form of Agreement.
- We would expect a successful Bidder to start the project as soon as commissioned.

Quotations will be evaluated following criteria listed below.

<u>Criteria</u>	<u>Weighting</u>
• Relevant experience	15%
• Quality of proposal	40%
• Cost	30%
• Value for money	15%

## **8. Contact**

If you have any questions about this brief, please contact:

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