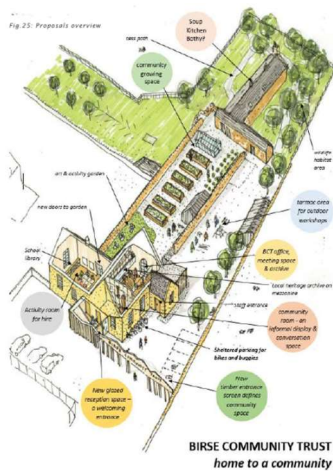


Birse Community Trust



THE OLD SCHOOL, BANKHEAD (FINZEAN)  
PROJECT DEVELOPMENT

Brief for Fundraising consultant



December 2022 (V.2)



Generously supported by:  
Aberdeenshire Council and the  
Scottish Government's Rural  
Community Led Vision Fund  
and



## 1.0 Introduction

### 1.1 Birse Community Trust

Birse Community Trust is a Community Development Trust that exists to promote the common good of the inhabitants of the parish of Birse (Aberdeenshire) and deliver wider benefits.

The Trust's main involvement is managing land and buildings on behalf of the community at a dozen sites across the parish. They are all sites that are important to the identity, wellbeing and future development of the community. The sites include a range of historic buildings and monuments: Birse Kirk and Birse Community Hall, The Old School, the Ballogie Soutar's Shop, the three water powered wood mills in Finzean (Sawmill, Turning Mill, Bucket Mill) and Corsedardar with the parish War Memorial and other standing stones

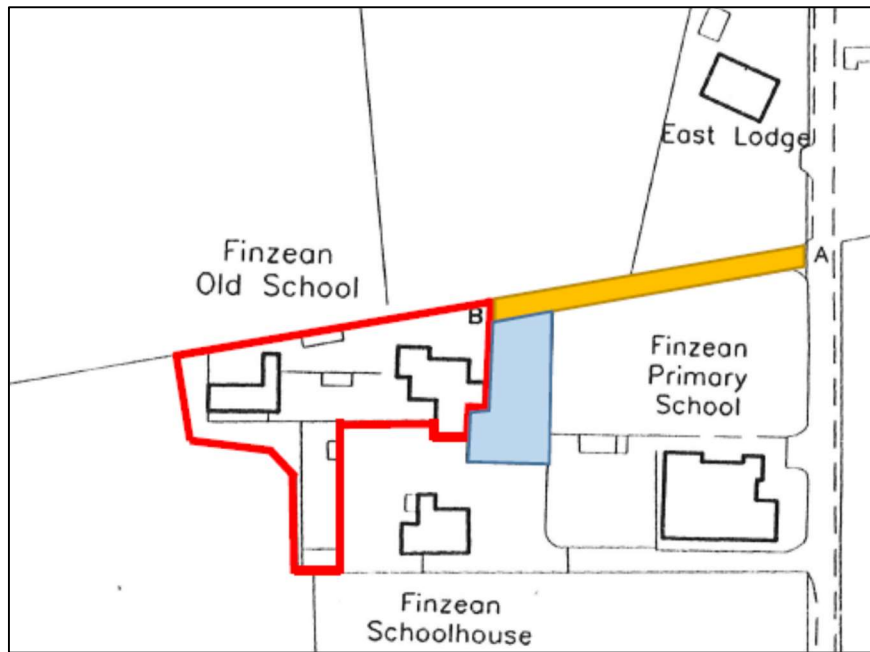
BCT also manages 1,000 ha of woodland on behalf of the community. Over half of this area is the native pinewoods managed by BCT in the Forest of Birse Commonty, where BCT also holds shared rights over a further 3,000 ha of open hill. The other woodland consists of Balfour Forest (241 ha), Slewdrum Forest (167 ha), Finzean Community Woods (15 ha) and School Wood (< 1 ha).

### 1.2 The Old School



**Above:** aerial photo pre-1963 illustrating the Old School (centre top) and the Soup Kitchen (left) with the open fronted north and south stores between. The former Schoolhouse and garden in the foreground are in private ownership.

The Old School was acquired from Aberdeenshire Council by BCT in 2003. The site includes the original Old School building and later Soup Kitchen as well as sheds and boundary walls. The adjacent 'new' school (built 1964), the playground, access (hatched) and parking (hatched) are in the ownership of Aberdeenshire Council and remain in use as a school (Finzean Primary School).



**Above:** BCT title plan, BCT title (red), School carpark (blue), Shared access road (orange)

Vehicle and pedestrian access to the Old School is via the road between the new school pitch and East Lodge, which is shared with the existing school. The Schoolhouse, East Lodge and the adjacent farm land are in private ownership.

### 1.3 History of the Old School

The school at Bankhead (Finzean) was established in 1732 from a legacy left by Dr Gilbert Ramsay (1656-1727), a former resident of the Parish who was Rector of Christ Church Barbados from 1692 until shortly before his death. The origin of Ramsey's wealth and the parish's links with the transatlantic slave trade were the subject of a 2018-19 BCT community heritage project 'Aye, it wis aabody'.

When a new school building was built 1964 the original building was used by the Council as a residential outdoor centre. The facility shut in the early 1990s and the building was leased to BCT before being acquired by the Trust in 2003.

The Old School was initially used as the BCT office and local business centre. As a result of decades of inappropriate repairs prior to BCT's acquisition the building has increasingly suffered from damp and decay. It has been used for storage and occasional use in recent years.

### 1.4 The project vision

The project will develop our community's vision for a traditional skills and field studies centre at the Old School, Bankhead (Finzean). This vision evolved through the project viability phase (2018-19) and is defined in the Project Viability Report (2019). A copy of the report is available on request.

The Old School will be repaired and adapted into a centre that will celebrate and share our community's diverse heritage. It will be a gateway and signpost to a wider place-based heritage initiative placing the school in the context of a "campus" of heritage assets and

spaces in community ownership or management. From ancient pinewoods to the intangible heritage of the craft of the millers at our water powered mills. Our vision is for a regional hub for training in traditional skills and rural crafts and a centre for raising awareness of the environment and conservation in the context of the current climate emergency and the concept of sustainability. It includes the conversion of the former Soup Kitchen building into self-catering accommodation for retreats and residencies, providing income and employment alongside funded residencies that align with our programme of training and workshops.

## 1.5 Project Development Phase

Following the project feasibility phase and Project Viability Report (2019), and following delays due to the Covid19 pandemic, BCT is now embarking on the project development phase.

During the project development phase we will:

- With the appointed Design Team:
  - Undertake further community engagement
  - Develop the vision to RIBA Stage 3. This will include specialist surveys of the site and site services.
  - Revise the cost estimates
- Develop and deliver a programme of pilot activities
- Deliver the capital works funding strategy, through applications to key funders, trust and foundations.

The Design Team was tendered and appointed at Feasibility Study phase and are led by ARC Architects.

The capital works (including fees, activities, project management and non-recoverable VAT) are estimated to be in the region of:

Old School- £900,000

Soup Kitchen- £209,000

Garden, sheds and outdoor spaces- £190,000

## 1.6 Client and key stakeholders

The project client is Birse Community Trust. A Project Steering Group has been formed, with 3 BCT Trustees and the BCT Manager. The appointed consultant will work closely with the Project Steering Group, the lead consultant (the architect) and the Community Engagement Coordinator.

## 2.0 Fundraising consultant

### 2.1 Scope of works

BCT is inviting tenders for a consultant to support the development and delivery of the fundraising strategy for the Old School project.

## 2.2 General requirements

Services required of the fundraising consultant, are to include, but need not be limited to:

- Developing the funding strategy with BCT, including advising on phasing as appropriate
- Identifying funding opportunities for the project
- Completing funding applications for the project

## 2.3 Specific requirements

The fundraising consultant will be required to develop and deliver

- A fundraising strategy, cognisant of the project works, costs and the funding climate
- R1 NLHF grant application (subject to the outcome of an Expression of Interest)
- Historic Environment Scotland grant application (subject to the outcome of an Expression of Interest)
- Community Ownership Fund application (subject to the outcome of an Expression of Interest)
- Grant applications to multiple private trusts, foundations and local & national government.
- Support BCT in developing and delivering a strategy for individual giving and crowd funding.

## 2.4 Programme

The fundraising consultant will be appointed on or by 20 January 2023. The contract is due conclude by 31 March 2023, but subject to the agreement of funders may be extended by 2-3 months. The outcome of discussions with funders is anticipated prior to the submission deadline of Monday 16 January 2023 (5pm).

Consultants should indicate in their submissions their availability to undertake the works to either the 31 March programme or an extended programme.

It is anticipated that (online) interviews will take place 19 January and that an inception meeting will be held with BCT and the appointed consultant on Friday 27<sup>th</sup> January, online (or in person at the Old School).

The successful consultants will be asked to provide a more detailed working programme at the start of the commission process.

## 2.5 Insurance

The successful lead consultant (and team) will be required to have as a minimum, and maintain until 6 years after completion of this commission, the following minimum insurance cover for any one occurrence or series of occurrences arising from one event:

Professional Indemnity	£1,000,000
Public Liability	£1,000,000

The consultant will be asked to exhibit their PL and PII document schedules prior to commencement of the work.

## 2.6 Payment

Payment will be on the submission of monthly invoices. Payment will be made by BACS.

## 3.0 Tender and Appointment

### 3.1 Instructions for tendering

The return date for tenders is 5pm on Monday 16 January 2023.

Submissions are to be addressed to:

BCT Office  
Old School  
Finzean  
Aberdeenshire AB316NY  
Or by email to: [bctoffice@birsecommunitytrust.org.uk](mailto:bctoffice@birsecommunitytrust.org.uk)

Any queries are to be addressed by e-mail to Office Manager at [bctoffice@birsecommunitytrust.org.uk](mailto:bctoffice@birsecommunitytrust.org.uk).

### 3.2 Form of submission

The fee should be based on a lump sum for the delivery of services outline in 2.2 and 2.3 above, with a breakdown of services by days and day rates.

The tender submission is to consist of the following:

- Practice profile and CVs of those delivering the services indicating expertise in the fields examined. Reference should be made to previous examples of relevant or similar work
- A day rate for services, including additional travel and expenses where applicable.

### 3.3 Appointment

The Tender evaluation criteria used to identify the most advantageous tender will include a significance emphasis on the quality and method of providing the services as well as the financial aspect of the submission.

The award criteria will be weighted 60/40 on quality and price.

The award quality criteria will be weighted between:

- Experience in fundraising, with particular reference to the heritage sector and the NLHF (50%)
- Experience of working for the charitable sector (15%)
- Experience of built heritage projects (20%)
- Understanding of the brief and empathy for the project vision (15%)

Birse Community Trust does not bind itself to accept the lowest fee tender and shall not be responsible for any loss or expense incurred by the tenderers during the tendering period.

The successful candidate will be appointed in accordance with the standard BCT Consultant Appointment Form.

## 4.0 Instructions for Tendering

Tenderers shall treat the details of this tender as private and confidential. Tenderers should not disclose the fact that they have been invited to tender or release details of the tender document other than on an “In Confidence” basis to those who have a legitimate need to know or whom they need to consult for the purpose of preparing the tender.

The tender should be submitted on the Form of Tender and Pricing Schedule incorporated herein. It should be signed by the Tenderer and submitted with their Tender Proposal Document.

Tenders should be emailed to:

Email: [bctoffice@birsecommunitytrust.org.uk](mailto:bctoffice@birsecommunitytrust.org.uk)

Tenders should arrive not later than 5pm on Monday 16 January 2023. Tenders received after this time and date will not normally be considered.

Tenders should be submitted strictly in accordance with the Invitation to Tender documents, without qualifications.

Should there be any doubt or obscurity as to the meaning of any portion of these instructions, these should be raised with the Project Manager as soon as possible in writing during the Tender Period.

Queries raised and answers given will be circulated to all tenderers.

Tenderers shall be deemed to have inspected initially the development property and therefore have satisfied themselves on all matters affecting their tender.

Tenderers shall furnish the names and addresses of any specialist firms or sub-contractors whom they propose to employ together with the reason and description of the services being performed by each. Tenderers will also be asked to provide insurance details and their Health and Safety Policy.

Any tender that does not conform with the requirements set out in the Invitation to Tender document will not normally be accepted.

## 5.0 Form of Tender

To Birse Community Trust:

I/We the undersigned hereby offer to carry out the service required and at the lump sum cost I/we have inserted in our response to this invitation to tender in accordance with the requirements and the terms and conditions as set out in the briefing documents.

I/We further undertake not to disclose the amount of my/our tender to any person or body before the date and time for the opening of the tenders.

I/We agree that our fee cost remains open for acceptance for a period of 60 days from the date fixed for the tender return.

I/We understand and accept that Birse Community Trust is not bound to accept the lowest or any offer, and that it will not reimburse any costs incurred with the preparation of the tender.

Dated this \_\_\_\_\_ day of \_\_\_\_\_ 2018.

Consultants Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Tel. No. \_\_\_\_\_

Signature \_\_\_\_\_

Witness \_\_\_\_\_

Witness \_\_\_\_\_

**\*Sign and attach to fee proposal**



## 6.0 Declaration of Non-Collusion

The essence of selective tendering is that the Employer shall receive bona fide competitive tenders from all the firms tendering. In recognition of this principle, I/we certify that this is a bona fide tender; intended to be competitive and that I/we have not fixed or adjusted the amount of the tender by or in accordance with any agreement or arrangements with any other person. I/We also certify that I/we have not and will not at any time before the return date of this tender, undertake any of the following acts:

Communicate to any person other than the person calling for those tenders the amount or approximate amount of the proposed tender, except where the disclosure, in confidence, of the approximate amount of the tender is necessary to obtain insurance premium quotations required for the preparation of the tender;

Enter into any agreement or arrangement with any other person that we shall refrain from tendering or as to the amount of any tender to be submitted;

Offer to pay or give or agree to pay or give any sum of money or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any tender or proposed tender for the said work any act or thing of the sort described above;

In this certificate the word "person" includes any persons and any body or association, corporate or non-corporate; and "any agreement or arrangement" includes any transaction formed or unformed, and whether legally binding or not.

Signature \_\_\_\_\_

Name \_\_\_\_\_ in the capacity of \_\_\_\_\_

Dated this \_\_\_\_\_ day of \_\_\_\_\_ 2018

Consultants Name \_\_\_\_\_

Address \_\_\_\_\_

Tel. No. \_\_\_\_\_

**\*Sign and attach to fee proposal**

## 7.0 Fee proposal

<b>Birse Community Trust- Old School Fundraising consultant</b>					
<b>Activity</b>	<b>Day rate</b>	<b>Days allocated</b>	<b>Fee</b>	<b>Expenses* Inc./Ex.</b>	<b>Sub-totals</b>
Drafting funding strategy					
Develop & deliver strategy for individual giving and crowd funding					
HES grant application					
NLHF R1 grant application					
Community Ownership Fund application					
Day rate for other grant application support per section 2.2		Leave blank	Leave blank		Exclude from sub-totals
<b>VAT (where applicable)</b>					<b>£</b>
<b>TOTAL</b>					<b>£</b>

\*(if not included, provide schedule of expense charges and anticipated figure)