



**Invitation to Tender (ITT)
for
St Osyth Priory & Parish Trust
Fundraising Consultant**

Submission of Tenders: 4th July 2025

Any queries relating to this tender should be submitted via the
St Osyth Priory & Parish Trust email - tenders@stosythpriorytrust.org.uk

Issue Date: 13th June 2025



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1.0 PROJECT OVERVIEW AND CONTEXT

1.1 INTRODUCTION

St Osyth Priory & Parish Trust is currently in the development phase of a project funded by a grant from the National Lottery Heritage Fund which will focus on the redevelopment of the Tithe Barn and Old Dairy and into hireable wedding, event and community spaces.

St Osyth Priory and Parish Trust wishes to appoint a suitably qualified and highly experienced Fundraising Consultant to work on the Development phase of this project.

This ITT sets out the background to the project, the tender process, timescales, and management arrangements.

There is, however, no guarantee that Delivery Phase services will be required, and bidders should take account of this.

1.2 BACKGROUND INFORMATION

St Osyth Abbey (originally and still commonly known as St Osyth Priory) was a house of Augustinian canons in the parish of St Osyth (then named Chich) in Essex, England in use from the 12th to 16th centuries. Prior to the Reformation, it was the third wealthiest abbey in the country. After falling into private ownership by the Darcy family following the reformation, the abbey was severely damaged in the English Civil War, and the house and 6,800-acre estate was owned privately throughout its history.

The house was requisitioned during the Second World War and then sold in 1948 to the Loyal and Ancient Order of Shepherds who founded a convalescent home here. Five parts of the priory are Grade I listed buildings. In 1954 Mr Somerset de Chair, a popular novelist and MP, purchased the property, allowing the convalescent home to remain in the main building for many years (closed 1980), and converting the Gatehouse into a separate residence. De Chair developed the gardens and opened the property to the public. He also gradually sold off parts of the estate and allowed large scale gravel extraction to disfigure much of the surrounding landscape. After his marriage in 1974 to Lady Juliet Wentworth Fitzwilliam, the Wentworth Woodhouse art collection, which she had inherited, was displayed here. On de Chair's death in 1995 the property was put up for sale by his widow, and it was eventually purchased by the present owners, the Sargeant family, in 1999. It is part of the Historic Houses Association but is privately owned by the Sargeant family.

The site is used for events, open for walking tours, and there is an education centre that welcomes school visitors to the site.

St Osyth Priory & Parish Trust is an exceptional collection of heritage assets comprising 16 separate Grade I, II* and II listed buildings set within a Grade II registered historic park and garden. The vision for this mesmerising collection of buildings and landscape, is to fully revitalise and restore the historic assets to their former glory. By utilising many different options, the estate will have a new long term and viable future that engages with the community and brings new economic prosperity to the local area. The vision is that the Tithe Barn and Old Dairy buildings will deliver a wedding and venue that can be leased and potentially run by a private operator - with the buildings used by the community to meet the Trusts charitable purposes when not rented out commercially.

The Trust has been granted a Development Phase Grant from The national Lottery Heritage Fund, and as such are looking to appoint a Fundraising Consultant to develop, manage and deliver the Trust's match funding strategy and manage the successful grants and related administration.

1.3 PROGRAMME TIMELINE

Below is an approximate timeline of the programme:

RIBA Stage 2 – July 2025 – December 2025

1. Pre-planning Application Submitted – September 2025 to November 2025
2. Ongoing SOPPT Meetings

RIBA Stage 3 – December 2025 – August 2026

1. Coordinated Designs & costs Approved – May 2026
2. Match Funding for Delivery Phased secured and in place, agreements in place - May 2026 to August 2026
3. Planning/LBC Applications – April 2026 – May 2026
4. Delivery Phase Application Prepared – June 2026 – July 2026
5. Delivery Phase Application Submitted - August 2026
6. Planning/LBC Decision – December (TBC)
7. Ongoing SOPPT Meetings

End of Development Phase

RIBA Stage 4 – Dec 2026 to March 2027

1. Decision on Delivery Phase Application – December 2026 (TBC)
2. Estimated Permission to Start Received (Delivery Phase) – January 2027
3. Discharge Pre-Commencement Planning/LBC conditions – February 2027 to May 2027
4. Ongoing SOPPT Meetings

RIBA Stage 5 – April 2027 to April 2028

1. Construction - May 2027 to December 2027
2. Fit out and interpretation installation period – January 2028 to March 2028
3. Fit out and interpretation installation complete – March 2028
4. Ongoing SOPPT Meetings

RIBA Stage 6 Handover of sites & testing for close out – May 2028 to August 2028

1. Ongoing SOPPT Meetings

RIBA Stage 7 In use and open for Autumn - August 2028 to March 2029

1. Ongoing SOPPT Meetings
2. Project Evaluation Submitted - November 2028 to March 2029
3. Activity period and programme ends – March 2029

2.0 FUNDRAISING CONSULTANT SCOPE OF WORKS

2.1 OVERVIEW

Working closely with the Board of Trustees and the Project Manager, this role will include supporting a range of projects across a wide spectrum of fundraising mechanisms including: donor engagement and development; fundraising in line with the strategic objectives; community fundraising; events; commercial marketing and creating any Gift Aid opportunities from events.

Coworking and collaboration with the Project Manager for the fundraising strategy and implementation will be required to ensure that funding is in place to support the capital programme, rollout the supporting activity plans and the day-to-day running of the Trust.

You will also be required to support funder reporting and the development (writing and submission) of the Delivery Phase Application to The National Lottery Heritage Fund.

SOPPT need to raise approximately £850K in match funding, volunteer hours and in kind support from a variety of sources, for example Trusts and Foundations, Individuals and Corporates. This needs to be in place or underwritten by the time the Delivery Phase application to The National Lottery Heritage Fund which will be submitted in August 2025.

2.2 GENERAL TASKS

2.2.1 FUNDRAISING STRATEGY

The Fundraising Consultant will provide support to the Trust on the following key strategic projects:

- Review, development and implementation of a fully integrated Fundraising Strategy for St Osyth Priory- including ongoing funding of the Tithe Barn and Old Dairy project.
- Review, development and implementation of a fundraising strategy and making applications to raise funding for The Cart Lodge and Abbott's Tower as part of a future wave of works.
- Attend monthly Project Team Meetings and Trustee Meetings as required.
- Attend fundraising/development meetings with potential funders as required.
- Proactive building of funding pipeline and opportunities.
- Creating, writing, submitting and managing the creation of funding applications from expression of interest onwards.
- Responsible for Funder reporting, evaluation and funding management.
- Providing monthly updated financial information to assess and monitor impact and cash flow projections.
- Working with the Trust to ensure that fundraising strategy meets priorities and supports the business plan.
- Develop a strategy to maximise giving opportunities across all activities and events, including community giving and Gift Aid.
- Ensure that all funder deadlines and grant condition requirements are met.
- Draft and submit the Delivery Phase Application to The national Lottery Heritage fund, drawing on wider project team and reports to prepare responses to all questions.

2.2.2 COMMUNICATIONS

- Responsible for planning and creation of all mass electronic communication sent to stakeholder groups and Trustees regarding funder updates.
- Attend and report at monthly meetings including Project Team and Trustee Meetings as required.

2.2.3 DONOR RELATIONSHIPS

- Assist in establishing set donor management processes.
- Assist in developing donor journeys.
- Support the development of a new CRM database Develop and implement a community fundraising strategy.
- Help us develop exciting new creative community fundraising strategies through developing resources, engaging volunteers and building relationships with local groups and organisations. Assist in establishing additional sources of funding.
- Support the development of a Major Donor strategy.
- Support the development of events fundraising.
- Explore new and alternative sources of funding.
- Any other duties as may be reasonably requested.

2.2.4 COORDINATING TRUST SIGN-OFF

- Work with the management team of St Osyth Priory & Parish Trust to ensure successful Trust sign off.
- Keep appropriate records and meeting minutes and liaise with Trustees and Project Manager to ensure actions from meetings are followed up and implemented.

2.2.5 OTHER DUTIES

- Attend and participate in SOPPT events as required
- Provide fundraising training to SOPPT and provide advise around suitable training opportunities
- Maintain confidentiality at all times.

3.0 INSTRUCTIONS FOR TENDERING

3.1 GENERAL TENDERING INFORMATION

- 3.1.1 These instructions are designed to ensure that all Tenderers are given equal and fair consideration. It is important therefore that you provide all information asked for in the format and order specified in the tender documents. If you have any doubt as to what is required or will have difficulty in providing the information requested, please submit a question via tenders@stosythpriorytrust.org.uk
- 3.1.2 St Osyth Priory and Parish Trust reserves the right to contact and take up references. Tenderers are required to provide details of three references for work of similar scale and nature in the ITT submission.
- 3.1.3 Tenders shall be submitted in accordance with these instructions.
- 3.1.4 Tenders that do not comply with any mandatory requirement (i.e. where the words “shall” or “must” are used) will be rejected.
- 3.1.5 This ITT does not constitute an offer and St Osyth Priory & Parish Trust does not undertake to accept any tender. St Osyth Priory & Parish Trust reserves the right to accept a Tender in part, rather than in full.
- 3.1.6 Whilst the information contained in this ITT is believed to be correct at the time of issue neither St Osyth Priory & Parish Trust, nor its advisors, will accept any liability for its accuracy, adequacy or completeness nor will any express or implied warranty be given. This exclusion extends to liability in relation to any statement, opinion or conclusion contained in or any omission from this ITT (including its appendices) and in respect of any other written or oral communication transmitted (or otherwise available) to any Tenderer. This exclusion does not extend to any fraudulent misrepresentation made by or on behalf of St Osyth Priory and Parish Trust.

3.2 CONFIDENTIAL NATURE OF TENDER DOCUMENTATION

- 3.2.1 Documentation in relation to this Invitation to Tender and any Tenders received by St Osyth Priory and Parish Trust in response to it shall be treated as a private and confidential save where the disclosure is required by law.
- 3.2.2 Other than with professional advisers or sub-contractors that need to be consulted with regards to the preparation of the Tender, Tenderers shall not:
- a) Disclose that they have been invited to tender.
 - b) Discuss the Invitation or the Tender they intend to make.
 - c) Release any information relating to the ITT and/or the Tender that they intend to make.

- d) Devise or amend the content of their Tender in accordance with any agreement or arrangement with any other organisation and/or person, other than in good faith with an organisation and/or person who is a proposed partner, supplier, consortium member or provider of finance.
- e) Enter into any agreement or arrangement with any other organisation and/or person, other than in good faith with an organisation and/or person who is a proposed partner, supplier, consortium member, or provider of finance.
- f) Enter into any agreement or arrangement with any other organisation and/or person that has the effect of prohibiting or excluding that person from submitting a Tender.
- g) Canvas directly or indirectly with any other Tenderer, Member or Officer of St Osyth Priory and Parish Trust (including its consultants and contractors) in relation to this procurement.
- h) Attempt to obtain information from any of the employees or agents of St Osyth Priory and Parish Trust or their advisors concerning another Tenderer or Tender.
- i) Pass the ITT documents to any other organisation.

3.2.3 If a Tenderer does not observe the points above, St Osyth Priory & Parish Trust will reject their tender and may decide not to invite the Tenderer to tender for future work.

3.2.4 St Osyth Priory and Parish Trust will consider only bona fide bids, which do not refer to any other bid. It shall be entitled to disqualify any application where collusive bidding is suspected.

3.3 CONDITIONS

3.3.1 St Osyth Priory and Parish Trust is not liable by way of contract, for any work undertaken or cost incurred by any respondent in connection with the preparation, submission, or assessment of any tender. The Tenderer is responsible for independently checking and satisfying himself/herself of the accuracy of the information provided in this brief.

3.3.2 St Osyth Priory and Parish Trust reserves the right to retain all submission material, including that prepared for presentation purposes, and display or otherwise utilise the material as it may consider appropriate, at no cost to them.

3.3.3 Subject to satisfactory performance and funding being secured for the Delivery Phase, the Project Management and Cost Consultant team will also be commissioned through this tender to manage the implementation of all landscape and building works in the Delivery Phase. **There is, however, no guarantee that delivery stage services will be required, and bidders should take account of this.**

3.4 COMMUNICATION AND QUESTIONS

- 3.4.1 All formal communications (including, but not limited to, clarification questions, appointments for site visits and the submission of Tenders) to St Osyth Priory and Parish Trust are to be made in writing using tenders@stosythpriorytrust.org.uk
- 3.4.2 It is the Tenderer's responsibility to ensure any verbal queries or clarifications they generate are confirmed in writing via email. In the event of any misunderstandings reliance on verbal communications will not be permissible.
- 3.4.3 If a Tenderer is in doubt as to the interpretation of any part of the ITT, or if they consider that any of its requirements are ambiguous or conflict with any other requirements, they should contact St Osyth Priory & Parish Trust via email.
- 3.4.4 No representation, explanation or statement made to the Tenderer or anyone else by or on behalf, or purportedly on behalf of St Osyth Priory and Parish Trust as to the meaning of the Tender documents, or otherwise in explanation as aforesaid, shall be binding on St Osyth Priory & Parish Trust in the exercise of its obligations under a subsequently awarded contract.
- 3.4.5 Should any Tenderer wish to clarify the interpretation of any part of the ITT requirements, they may submit clarification questions via email system. This opportunity exists until the deadline of 20th June 2025 after which no undertaking is given to reply. St Osyth Priory & Parish Trust will use their best endeavours to respond as a matter of assistance to the Tenderer, but it shall not be construed to add to, modify or take away from the meaning and intent of the proposed contract and/or the obligations and liabilities of the Tenderer. Tenderers' messages are managed in standard business hours only, Monday to Friday.
- 3.4.6 Where an enquiry is beneficial to all Tenderers, both an anonymised copy of the clarification question and the response will be communicated to all Tenderers. If a Tenderer wishes St Osyth Priory & Parish Trust to treat a clarification as confidential and not issue a response to all Tenderers it must state this when submitting the clarification question. If, in the opinion of St Osyth Priory & Parish Trust, the clarification is not confidential, St Osyth Priory & Parish Trust will inform the Tenderer, and the Tenderer will have an opportunity to withdraw it. If the clarification is not withdrawn, both the question and response will be sent to other Tenderers anonymously.
- 3.4.7 St Osyth Priory & Parish Trust reserves the right (but shall not be obliged) to seek clarification of any aspect of a Tender during the evaluation phase where necessary for the purposes of carrying out a fair evaluation. Tenderers are asked to respond to such requests promptly.

3.5 EVALUATION CRITERIA

- 3.5.1 The final contract award will be to the Most Economically Advantageous Tender. The tender evaluation criteria will be based on a combination of Quality and Price which has been specified and weighted in the table below.
- 3.5.2 Once all evaluations have been completed St Osyth Priory & Parish Trust will add the quality and price scores together to provide a total score for each Tenderer. The Tenderer with the highest total score will be recommended to deliver the service.

Criteria		Weighting
Quality - 70%		
1	3 x Case studies demonstrating relevant experience and demonstratable success in achieving match funding	30%
2	Key project personnel relevant experience	20%
3	Project methodology	20%
Price - 30%		
	Fee proposal	30%
Total		100%

3.6 TENDER CONTENTS AND SCORING METHODOLOGY

3.6.1 WHAT TO INCLUDE

For additional guidance for how St Osyth Priory & Parish Trust would like you to respond, please see the recommendations below. Responses should be sent as an emailed PDF attachment.

1. **Case Studies:** To showcase yourself and/or your organisation, please include case studies covering the elements of the Role, Scope and Responsibilities as well as the schedule of services; this helps to demonstrate clearly how your previous experience contributes to your value proposition.
2. **Details of who will be involved, including Bios and CVs:** In addition to this, providing an overview of your proposed team's individual bios, their responsibilities and brief examples of relevant past work is necessary to demonstrate how well you are suited to delivering the proposed works. It will be essential that the proposed staff can only be replaced with someone of equal experience due to our Due Diligence policies.
3. **Methodology and Timeline:** In addition, please provide a methodology, timeline & order of outputs, including an estimated time on site. Tell us how you would propose delivering against the brief, and why. Please indicate how much site-based presence is expected, especially during the construction phase.

4. **References:** Please provide three referees' details and a description of similar contracts delivered over the past five years.
5. **Insurance:** Please confirm that you have:
 - a. Employer's liability insurance
 - b. £5m Professional indemnity insurance, for every claim
 - c. £5m Public liability insurance

Proof of insurance will be required from the successful bidder.

3.7 ITT – QUALITY (70%)

3.7.1 This element equates to 70% of the full mark and the scoring of each element of the requirement will use the scoring system as shown in table below.

Method Statements Question	Scoring Range	Weighting
3 x Case studies demonstrating relevant experience and demonstrable success in achieving match funding	0 to 5	30%
Key project personnel relevant experience	0 to 5	25%
Project methodology	0 to 5	20%

3.7.2 The following scoring mechanism will be used to score the quality method statements responses:

Score	Rationale/Judgment	General Description
0	The response fails to comply with the requirements of this ITT or is otherwise incapable of evaluation.	Wholly unsatisfactory
1	The response does not demonstrate an understanding of St Osyth Priory & Parish Trust's requirements as defined in this ITT and is incomplete or is otherwise unconvincing in significant respects.	Unsatisfactory
2	The response demonstrates only a limited understanding of St Osyth Priory & Parish Trust's requirements as defined in this ITT, lacks detail or is not convincing in some respects	Cause for concern
3	The response demonstrates an understanding of, and compliance with St Osyth Priory & Parish Trust's requirements as defined in this ITT.	Acceptable

4	The response indicates that the bidder would effectively deliver the project in accordance with St Osyth Priory and Parish Trust's requirements. The response is convincing, detailed and demonstrates a good understanding of St Osyth Priory & Parish Trust's requirements as defined in this ITT.	Good
5	The response indicates that the bidder would effectively deliver the project in accordance with St Osyth Priory and Parish Trust's requirements. The response is entirely convincing, highly detailed and demonstrates a complete understanding of and compliance with St Osyth Priory and Parish Trust's requirements as defined in this ITT.	Excellent

3.7.3 In order to ensure that the successful Tenderer has met minimum quality standards, any Tenderer whose score includes two or more answers that are awarded a score of 2 or less, or any awarded of a score of 0, will be deemed to have failed minimum quality standards and will be deselected from the tender process.

3.8 ITT – PRICE (30%)

3.8.1 The pricing schedules submitted will be worth 30% of the overall marks.

Please note that although the Delivery Phase is subjected to funding, please include both Development Phase and Delivery Phase in your proposal as breakdowns of each RIBA stage.

The Tenderer with the lowest price (Development Phase plus Delivery Phase) will receive the maximum points available.

Each remaining Tenderers' price will be awarded a score based on the percentage difference between their price and that of the most competitive price:

Score = Lowest Tender Sum / Contractors Tender sum x Max. Weighted Available Score

Please see an illustrated example of the calculation methodology below for clarity:

Tenderer A	Tenderer B	Tenderer C	Tenderer D
15,849	17,094	25,497	31,246
30%	27.81%	18.64%	15.21%

A = 15,849 and gets 30%

A divided by B = 15,849/17,094 = 0.927

Proportional Score 30 x 0.927 = 27.81%

3.9 CLARIFICATION MEETING / PRESENTATIONS

3.9.1 As part of the tender evaluation process bidders may be required to make a presentation or attend a clarification meeting online. Bidders will be notified as soon as possible if they are required to give a presentation or attend a clarification meeting. Following the presentations /interviews the scores attained in the written submission may be moderated.

3.10 INDICATIVE PROCUREMENT TIMETABLE

3.10.1 Below is a table of indicative timescales for the procurement process. Please note that some of these dates may be subject to change. As time is of the essence for this project, only contractors who can meet the timetable set out below should submit a tender for this service contract.

MILESTONE	TARGET DATE
Invitation to Tender (ITT) available online	13 th June 2025
Tender returns: ITT Submission Deadline	4 th July 2025
Tender Evaluation Period	w/c 7 th July 2025
Clarification Meeting (Online)	w/c 7 th July 2025
Confirmation of Appointment	11 th July 2025

3.10.2 The above dates are for guidance only and may be amended by written notice by and at the sole discretion of St Osyth Priory and Parish Trust.

3.10.3 By submitting a tender for the provision of the Services a Tenderer confirms that it is able to meet the dates above including the provision of all necessary personnel, facilities and information to deliver the Services.