



TENDER FOR **GRANT APPLICATION EXPERTISE**

Guide price of **£27,000** plus a possible **£10,000** bonus

Introduction

The Society of Antiquaries of Scotland is looking for expertise in writing successful major funding bids to help it deliver its Transformation Plan. The applicant will deliver a successful Expression of Interest (EOI) and initial Development Phase grant application for submission to the National Lottery Heritage Fund (NLHF) Grants over £250,000 scheme. The core of this application includes the acquisition and redevelopment of a B-listed building in central Edinburgh.

Specification

Delivery to the Society of Antiquaries of Scotland Director of a completed Expression of Interest (EOI) for submission to the National Lottery Heritage Fund for a major grant over £250,000. The total value of the grant will be in the region of £5 million.

Delivery to the Society of Antiquaries of Scotland Director of a completed Development phase (stage 1) application for submission to the National Lottery Heritage Fund for a major grant over £250,000. The total value of the grant will be in the region of £5 million.

The Development phase application will be fully completed and ready to submit for the end of February 2025 application deadline as set by NLHF.

The initial EOI will be fully completed and ready to submit as soon as possible (e.g. October 2024) to provide time to meet the end of February 2025 application deadline as set by NLHF.

Both the EOI and Development phase application will be developed in collaboration with Society of Antiquaries of Scotland staff and trustees with advice from the More Partnership and others as required.

The EOI and Development phase application will include a persuasive case for support developed in collaboration with the More Partnership and supported by research already undertaken on the Transformation Project. Information on research already available for an application can be provided on request.

The successful applicant will assist with quotes, costs and budget for the project application.

The successful applicant will work collaboratively with Society staff and trustees, and the wider project team, to follow a work schedule and timetable mutually agreed at the earliest opportunity, and within two weeks of being awarded the contract.

The successful applicant will report to the Director of the Society, Dr Simon Gilmour.

Both the EOI and Development phase application will be to the highest quality as agreed by the Director of the Society.

The tender is for work up to £27,000 in value (including VAT) to deliver two documents. A successful application will be rewarded with a further £10,000 after completion of the initial project.

Terms and conditions

The applicant will undertake and complete quality EOI and Development phase (stage 1) NLHF grant applications before the end of February 2025, including the development of a persuasive case for support in collaboration with the Society of Antiquaries of Scotland and external organisations contracted or otherwise directed by the Society. This will build on work already undertaken towards the application.

The applicants work will comprise and deliver all the key activities, objectives and milestones, services, deliverables and outputs as stated and laid out in the Society's tender document and in any proposal bid submitted to the Society in response to the tender.

Both parties will follow a work schedule and timetable mutually agreed at the earliest opportunity, and within two weeks of being awarded the contract.

Initial milestones will include (dates to be confirmed):

- 1) The signing of an agreed contract
- 2) The delivery of a completed EOI for submission by the Society to the NLHF (mid-October 2024)
- 3) The NLHF response to the EOI
- 4) The delivery of a completed Development phase (stage 1) application for submission by the Society to the NLHF (end-February 2025)
- 5) The NLHF response to the Development phase (stage 1) application (end-June 2025)

On completion of work and on receipt of all agreed deliverables sent to the Society on time, in full and to high quality, the Society will pay the successful applicant in mutually agreed stages (dates to be confirmed):

- Payment 1 (30%, £8,100) to be paid once the contract is signed by both parties (September 2024 – milestone 1)
- Payment 2 (10%, £2,700) to be paid on receipt of a completed EOI for submission by the Society to the NLHF (mid-October 2024 - milestone 2)
- Payment 3 (10%, £2,700) to be paid on receipt of positive response from NLHF to EOI application (20 working days - milestone 3)
- Payment 4 (50%, £13,500) to be paid on receipt of a completed Development phase (stage 1) application for submission by the Society to the NLHF (end-February 2025 - milestone 4)
- Payment 5 (£10,000) to be paid on receipt of a positive response from NLHF to the Development phase (stage 1) application (end-June 2025 – milestone 5)

Any changes to the brief or methodology to be employed by the successful applicant will be mutually agreed in writing. Any such changes will not affect the overall cost unless agreed in writing with the Director of the Society of Antiquaries of Scotland.

The main point of contact for this project and contract will be Simon Gilmour, Director at the Society. A point of contact for the applicant will be included in their submission.

Contact details to be made available at the start of the project.

This project will be carried out in as environmentally friendly way as possible and practical.

Any intellectual property which the applicant generates during this project shall belong to the Society. Such intellectual property may include (but is not limited to) copyright works, computer programs, designs, documentation, trademarks and ownership rights or other materials.

If the applicant generates any such intellectual property they will promptly provide full details to the Society and will not disclose any details to anyone outside the Society either during or after this contract period.

Evaluation criteria

Proposals submitted in response to this tender will be evaluated on value for money, quality of submission, and experience in relation to the criteria below. However, the full guide price is expected.

Requirements

Demonstrable successful experience in delivering successful major NLHF funding bids.

A track record of successful fundraising, including sizeable NLHF applications, relating to redevelopment of a listed building.

Demonstrable experience of delivering complex and persuasive funding bids to a tight timetable.

Experience of working with small charitable organisations.

Track record of bringing innovative creative thinking and fresh ideas to an organisation and/ or its services.

Excellent interpersonal and networking skills.

Experience of working with a heritage organisation in the UK.

Submission requirements

A guide price of **£27,000** including VAT is provided.

A further **£10,000** will be paid if the final provided NLHF application is successful.

Please submit a written costed proposal and outline methodology to Dr Simon Gilmour, Director, at director@socantscot.org and include full contact details. Your proposal will be treated in strictest confidence.

Proposals should include all relevant information to meet the specification and the evaluation criteria.

Queries regarding the tender should be addressed to the Director by email (see above) or by phone (+447799691981) by 5pm **Thursday 29th of August 2024**.

Quotations are invited to be submitted by midnight **Sunday 1st of September 2024**.

Interviews with shortlisted applicants will be held soon after at a mutually agreed date and time. The contract to be awarded as soon as possible thereafter.

The project is required to complete by end of **31st of February 2025**.

At the Society of Antiquaries of Scotland diversity, equality and inclusion is an integral part of our culture and organisational values so it is important to us that this is reflected in everything that we do. We welcome applications from all individuals irrespective of age, race, gender, sexual orientation, ethnicity, religion or belief, disability, marital status, or parental responsibilities to ensure we actively embrace an inclusive and representative culture that encourages, supports, and celebrates our differences.

The Society of Antiquaries of Scotland

The Society has been around for over 240 years, actively supporting the study and enjoyment of Scotland's past, ensuring it's for everyone to research, share, enjoy and protect, home and abroad. We are now looking to contract a new role created to help us enhance the organisation and increase its sustainability into the future.

What we do

The Society of Antiquaries of Scotland is a heritage charity with global membership providing expertise, support and resources to enhance and promote the understanding and enjoyment of Scotland's past. It empowers and facilitates research and innovation, advocating as an independent voice for heritage, and sharing knowledge of the past with everyone.

Further information on the Transformation Project is available below.

Transformation Project

A project to transform a two hundred- and forty-year-old learned Society for the 21st century. Originally formed to act as a meeting place for people, ideas and cultural heritage, the time is right to reinvigorate that mission by returning the Society to a more public-facing charity providing a creative, public, accessible focal point to engage with Scotland's past through volunteering, training, education, exhibitions and events. Scotland's Heritage Hub (SHH), as it is currently named, will be an independent centre of knowledge exchange for Scotland's historic environment helping deliver the Society's vision that Scotland's past is for everyone to research, share, enjoy and protect, at home and abroad and focused on the key attributes of a long-lived and successful learned society.

The Society of Antiquaries of Scotland is a heritage charity with global membership providing expertise, support and resources to enhance and promote the understanding and enjoyment of Scotland's past. It empowers and facilitates research and innovation, advocating as an independent voice for heritage, and sharing knowledge of the past to everyone. Through public, office and meeting space SHH will forge a collaborative research ethos between organisations under one roof which facilitates the talents of the heritage sector to enable the public to explore, understand and promote all aspects of Scotland's past.

What?

At the core of the project is a redeveloped B-Listed building, conserved for the future and reimagined to provide flexible education, recording, exhibition and reception space, office accommodation and meeting rooms. It will be accessible and information technology laden, enabling quality recording and education through state-of-the-art facilities including a digital research laboratory for training, volunteer and research purposes.

Rental flats above the public space will provide income to maintain the building and long-term financial sustainability for the Society, ensuring it continues for the next 240 years.

Where?

In central Edinburgh within the World Heritage Site and situated adjacent to the National Museum of Scotland that the Society founded. The property lies adjacent to a busy north-south thoroughfare for professionals working in the city and tourists visiting. The National Library of Scotland, University of Edinburgh (including St Cecilia's Hall), Surgeon's Hall Museum, Edinburgh Castle, Royal Mile, Scottish Parliament and Historic Environment Scotland are all within easy walking distance providing a convenient locus for heritage and tourism related activity within the historic centre of Edinburgh.

SHH will be accessible to as wide a range of users and visitors as possible from across Scotland and beyond, and is connected by good public transport links, such as bus routes or a short walk from Waverley train station.

The central Edinburgh location is also a convenient and sought after place to live, ensuring the updated flats will continue to provide a steady stream of income to the Society.

When?

The Society has negotiated a genuinely unique opportunity to purchase a central Edinburgh property with its own heritage value, affording three years from 1 January 2023 to raise the £2.1m necessary to buy the whole building.

The unique opportunity provided by this purchase agreement enables the Society to own its own property once again by 1 January 2027, thereby setting the charity on a firm foundation for the next two hundred and forty years.

It is extremely unlikely that this configuration of opportunity, building, location and price will occur again.

Why?

The building will enable the Society to significantly enhance its current activities and develop new creative and more outward facing activities and services for the public and its Fellows. Currently the Society is unable to welcome Fellows or host meetings in its own rooms, it cannot host events without significant rental outlay.

It will improve the visibility and remove the challenges to the accessibility of the Society to Fellows and the public. A front door presence in Edinburgh will welcome people to engage with the Society and Scotland's past in a beautiful and stimulating environment and provide greater prominence in the city for the work of both the Society and its Fellows.

An independent physical space will bring people together, encourage positive community engagement with Scotland's heritage and act as a focus for the historic environment sector more generally.

A quality space will better reflect the imprimatur of the Society, strengthening its ability to draw in membership and generating an excellent atmosphere for the encouragement of philanthropy, increasing its sustainability.

The building, and especially the flats, provide net income up to an estimated £100,000 a year ensuring the Society is more financially secure and can develop more benefits for the heritage sector and Fellows.

The Society has been based in four small rooms in a converted 19th century block of flats owned by the National Museums Scotland since it moved from its premises on Queen Street with the National Museum of Antiquities of Scotland. These have serious challenges relating to accessibility for Fellows, staff and the public, restricting opportunities for growth and depriving the Society of true full independence. The building will provide fit-for-purpose offices for Society staff and other organisations, ensuring we can welcome anyone to work with us.

In short, the building will transform the Society into a more public facing charity making its knowledge and expertise more widely available and supporting the dissemination of Scotland's past to the world.

Work has been undertaken by Horizons Research to better articulate the potential of the building to enable the Society to provide enhanced public benefit.

How?

The Society needs to raise a total of c.£2.105m to purchase the building and c£3.455m to redevelop it, a total of c£5,560,000. A large proportion of this sum will need to be raised through grants but there will need to be at least a proportion of the sum raised separately through donations. The exact segmentation of the funding requirements will be developed through the written EOI and development phase applications.

The aim is to raise the full purchase cost of the building to avoid the necessity for loans which would impact on the financial return the project can provide to the Society and thus its charitable objectives; this would also ensure the project has long-term sustainability. Every donation, small or large, is therefore vitally important to making this happen.

This 243-year-old organisation will be reaching out to engage donors in a once in a lifetime opportunity to support a learned Society and its vision that Scotland's past is for everyone to research, share, enjoy and protect, at home and abroad.

This project will complete the initial funding applications to NLHF for a major grant to support this project.

More information on the Society and its activity is available on our website (www.socantscot.org) and can be gathered through informal discussion on the tender with the Director.