



**‘GROWING THE FUTURE’**

**Consultancy Support Brief**

**August 2024**

## **1.Introduction**

Stour Health and Wellbeing Partnership is looking to make a step change in its development from a totally volunteer led and run charity to one with a small core team of paid staff.

This change requires more outside help to address employment issues, fundraising, sustainability and project management.

We look forward to hearing from you if you think you have the necessary experience and skills to undertake the work.

## **2.About us**

The purpose of the Stour Health and Wellbeing Partnership (SHWP) is:

‘To improve the health and wellbeing of all residents in the Stour area through better partnership working’.

We do this by bringing together 40 plus organisations in South Warwickshire to work more effectively together and run a range of activities such as our Community Warm Hub in Shipston on Stour, proposed Toy Library and a range of physical activity and community building sessions in Shipston and the surrounding villages. As a volunteer led charity, we seek to influence services at every opportunity both within the community and with the emerging Integrated Care System.

Set up as a CIO in 2020, we now want to make a step change to meet the growing health and wellbeing need of the Stour community. We will do this by recruiting a small paid team of part time employees. This will include expanding the health and wellbeing provision in the new Health and Wellbeing Hub in Shipston on Stour.

To this end we have submitted a stage 1 application to the National Lottery Community fund and have or are in the process of applying to a wide variety of funders working with Warwickshire Community and Voluntary Action.

Overall, we are calling this project **‘Growing the Future’**.

## **3.Scope of the work**

As a volunteer run charity, we are seeking additional expertise to support the work required for the second stage of our lottery application and the delivery of our ‘Growing the Future’ project.

We are therefore seeking expressions of interest for three areas of support work:

### **Lot 1- Getting employment ready.**

We have not employed anyone yet within the Partnership although we have engaged a part-time self-employed person in the last 18 months. We therefore need to get ready to be able to employ a small staff team.

To this end the deliverables are:

- SHWP employment policies created.
- SHWP employment contracts created.
- Job pack creation including job descriptions, person specifications, advertising etc.
- Selection policy and procedures created.

## **Lot 2- Fundraising/business development strategy development**

This would be the collaborative development of a fundraising/business development strategy for SHWP that looks forward and enables us to be financially self-sustainable at the end of our key funders funding.

Key deliverables are the production of a 3-year fundraising/business development strategy including: -

- Fundraising audit including an analysis of similar Partnerships and Community Anchor Organisations fundraising and business development.
- SWOT analysis
- Fundraising objectives
- Key strategies
- Tactical plan
- Budget
- Monitoring

This should be a collaborative effort involving at least 2 workshops, 1 with the Trustee board and another with a relevant group to be decided.

The strategy should also include business development and traditional fundraising opportunities. It should also be compliant with what the National Lottery Community Fund will require as part of any stage 2 application.

## **Lot 3- Project Initiation Consultant for ‘Growing the Future’ including stage 2 National Lottery application**

This lot consists of overall project management of ‘Growing the Future’ and tied into this the project lead for submitting a successful stage 2 application to the National Lottery’s Reaching Community Fund. It is dependent on SHWP successfully passing stage 1 of the National Lottery Reaching Communities fund which we should know by the end of September 2024.

The deliverables are sub divided into:

### **Overall Project Management**

- Project lead
- Project plan
- Project documentation
- Trustee liaison
- Task and Finish group meetings x 2
- Oversee fundraising strategy lot ensuring timescales are met and coordinated.

- Undertake UK Shared Prosperity Fund reporting, ensuring outputs and outcomes met.

### National Lottery stage 2 application

At this moment, we have not secured stage 1 of the National Lottery Reaching Communities fund, so some deliverables will need to be clarified later. However, we envisage the deliverables to be:

- Creation and submission of stage 2 application and worked required.
- 3-year business plan to include: -
  - executive summary
  - about the organisation
  - governance and management structures
  - strategy
  - market appraisal and current approach
  - financial appraisal
  - risk register.
  - monitoring and evaluating the organisation.
  - organisational impact assessment
  - contact details for the organisation.
  - appendices
- Year 1 delivery plan for GTF
- Budgets
- Review and updating of key SHWP policies.

Applicants will need to ensure that they have the required insurances to deliver this activity.

### 4. Budget

Lot	Budget	Payment schedule
<b>LOT 1</b>	<b>£1250</b>	<b>Lot 1.</b> 25% upon commencement, 50% upon delivery of employment policies and contracts, 25% upon final deliverables.
<b>LOT 2</b>	<b>£3900</b>	<b>Lot 2:</b> 25% upon commencement, 50% upon submission of draft strategy, 25% upon completion.
<b>LOT 3</b>	<b>£9000</b>	<b>Lot 3.</b> 25% upon commencement, 50% upon submission of stage 2 application, 25% upon completion.

Budgets are inclusive of all costs. This work is part funded by the UK Shared Prosperity Fund monies which cannot fund VAT in most cases. Please advise on your EOI if VAT is an issue for you as part of this process – however applicants must note this may not be accommodated.

### 5. Contract duration

As we need to consider National Lottery decision making timescales, we are keen to discuss this in more detail at interview if selected.

The start date for each Lot is as follows:

**LOT 1-** October 24 and completed by end of November 24.

**LOT 2-** Late-September 2024- completed by end November 2024 or a timescale mutually agreed

**LOT 3-** Start beginning October 2024- completed by end December 2024 or stage 2 lottery deadline if later. Dependent on stage 1 success.

## 6. How to apply

Applicants may apply for one or more lots

The closing date for applications is 12 noon on **Wednesday 11<sup>th</sup> September 2024**

Interviews to be held week beginning 23rd September 2024.

We can provide feedback to unsuccessful candidates on request.

## 7. Instructions to respond to the brief

We wish to receive the following direct to Bob Armstrong's email inbox as Chair of Trustees.

[bob.armstrong@clara.co.uk](mailto:bob.armstrong@clara.co.uk)

- CV
- 1 case study of similar work if you have it.
- Maximum 2-page Expression of Interest at minimum 12-point font answering the questions posed in section 9, contract award criteria.
- Budget breakdown including day rate.
- 2 Referees contact details
- Confirmation of business insurances held and a copy of the certification

## 8. References

Please include with your submission the name and contact details of 2 referees who we will not contact until after the interview.

## 9. Contract award criteria

We will evaluate all submissions on the following criteria.

<b>Brief Area</b>	<b>Base requirement</b>	<b>Shows good practice</b>	<b>Exceeds expectations and shows innovation</b>
The skills to deliver the requirements	150	250	400
Budget meets requirements	75	125	200
Track record/experience	150	250	400
Approach and methodology appropriate/shows understanding of brief/added value	150	250	400

## 10 Risk

Risk	Likelihood	Severity	Total	Mitigation
Not all Lots taken up.	4	4	16	Promotion plan required. Some are stand alone.
Other funding not secured	3	4	12	This work in the main can happen without the full funding package.
SHWP does not get past stage 1 of the National Lottery Reaching Communities	3	4	12	We will hold on confirming Lot 3 and seek guidance from UKSPF as to what we can spend their money on. Would look to re-apply to the Lottery.
Timescales required for the Stage 2 application are different from expectations	4	3	12	Flexibility into contract timescales. Check at interview.
South Warwickshire Foundation Trust do not want SHWP to have a role in the new Health and Wellbeing Hub	2	3	6	Key will be what type of role. SHWP want to be responsible for delivery of activities and services on the ground floor but not manage the facility.
Funding not secured for work	1	5	5	Money secured from UKSPF and ACCESS funding

## 11 Confidentiality and Data Protection

All information shared with the consultant during this project, including but not limited to personal data, strategic plans, and financial information, must be treated as confidential. The consultant agrees to use such information solely for the purpose of fulfilling the contract requirements and not to disclose it to any third party without prior written consent from SHWP. The consultant must comply with all applicable data protection laws, including the General Data Protection Regulation (GDPR), ensuring that any personal data is processed lawfully, fairly, and transparently. Upon completion of the contract, the consultant must securely delete or return all confidential information and data as directed by SHWP.

**12. Contact details** Please contact the following if you have any questions and to finally submit.

Bob Armstrong- Chair of Trustees- [bob.armstrong@clara.co.uk](mailto:bob.armstrong@clara.co.uk) 07855 744868