



Capital Campaign Manager Invitation to tender

THE
PORTICO
LIBRARY



Background

Reuniting the Portico Library, uniting people

The Portico, a much-loved cultural destination in the heart of Manchester, was established in 1806 as a ground-breaking newsroom and library, and will now work with experts and a range of community stakeholders to trial plans for the bold £7 million capital development project that will transform the building and preserve the historic book collection.

During the Development Phase, the Library will invite local communities to work with them on testing how to transform the ground floor and basement into an open and welcoming area with dining and exhibition areas, a 'Northern Bookshop', educational activities, a collections-care lab, plus flexible and high-quality event and meeting spaces.

The upper floors will conserve and enhance the existing heritage, showcasing the unique book collection, manuscript archive and architecture. The technical access requirements, such as a lift, will be supported by creative consultation to establish how best to make the building fully accessible for all.



About the Portico

One of Manchester's longest-running institutions, the Portico is a subscription library and newsroom whose historic collection of over 25,000 books and archives spans over 450 years.

Alongside our members' services, everyone is welcome to enjoy our free exhibitions; take part in our events and workshops; dine in our cafe (Monday - Friday); discover our history; and immerse themselves in our beautiful Regency-period building.

History

The Portico Library was established by 400 founding subscribers in 1806, during Manchester's emergence as 'the first modern city'. Early readers and associates included word-famous authors, future Prime Ministers, leading scientists, and educators. Built with wealth derived from the Industrial Revolution, British empire-building, and colonial expansion, the Library amassed a collection that reflects the innovations, but also the exclusions and inequities of that time.

Today

The Portico Library became a registered charity in 2017 and now plays a central role in Manchester's cultural life and literary heritage. Working with our region's diverse communities, we explore and confront the city's complex histories through eclectic and imaginative events, exhibitions, and learning programmes. The prestigious Portico Prize promotes Northern writing and publishing, while the Portico Sadie Massey Awards nurture literacy and learning among young people.

Vision

Our vision is to be the most accessible, sustainable, and dynamic historic library, where past, present, and future are unlocked through creativity and collaboration.

Values

- Welcoming to all: reflecting our city
- Creative: promoting curiosity
- Equitable: Reading the past to improve the present
- Collaborative: community making

About the role

This role presents an exciting opportunity to lead and deliver a successful capital fundraising campaign over the next 13 months for the Portico Library's Reunited Project. Funded by The National Lottery Heritage Fund, the selected consultant(s) will be responsible for raising £2m in partnership match funding required for the Delivery Phase of the project.

Location

Working from home and the Library.

Contract

13 months - potential for extension dependent on National Lottery Heirtage Fund Delivery Phase funding. As such, the role will be reviewed formally towards the end of the initial contract before decisions are taken regarding its continuation.

Start date

W/c 1st July 2024

Fee

There is a fee allocation of circa £48k (including expenses and travel but excluding VAT) to contract a consultant to fulfil the role of Capital Campaign Manager for the 13 months Development Phase RIBA 0 – 3.

Subject to funding from the Heritage Fund, the needs of the project and satisfactory performance, we may consider the role of the Capital Campaign Manager consultant being extended to include the Delivery Phase RIBA 4 - 7. The scope of the role and services will be defined during the Delivery Phase with a fee to be negotiated based on the day rates set out in your response to this tender.

Should the project proceed into the Delivery Phase, applicants should note that there will be a gap in activities between the two Phases. No work will be undertaken in this gap, and no fees will be eligible or paid for any activity over this period.

Reporting to:

Reporting directly to the Librarian and more generally to the Reunited Project Team.

Who you will be working with:

The Librarian, Business Planner, Fundraising Circle, and colleagues across the Portico Library.

Key Responsibilities

- Develop and execute a Fundraising Plan including a cultivation and solicitation plan, transforming and revitalising existing programmes and developing new initiatives.
- To work with the Librarian and in-house fundraiser to ensure there is a coherent and coordinated capital and revenue fundraising strategy for the Portico Library.
- Be responsible for securing major grants from trusts, foundations, statutory funders, individual donors, and business supporters to meet fundraising targets for the Reunited project.
- Write funding bids, develop key stakeholder relationships, answer questions, arrange site visits and ensure all Trust and the Heritage Fund reporting requirements are met in a timely fashion.
- Develop case for support and fundraising messaging to deliver an integrated campaign alongside revenue fundraising priorities.
- Establish a Fundraising Circle of well-networked individuals who will support fundraising activities and events.
- Contribute to development of donor database to ensure that information is logged accurately, records are kept up to date, a gift aid reclaim system is in place, donations are processed seamlessly and acknowledged promptly.
- Introduce a stewardship programme in collaboration with other team members to ensure everyone is aware of key stakeholders and high net-worth individuals to meet capital income targets.
- Ensure all work is safe, legal and complies with regulatory and legislative requirements.



About you

We are looking for an individual who has experience of managing successful capital campaigns in the heritage sector and shares our vision and values. The attributes we are looking for:

- Significant hands-on experience managing and delivering large-scale capital campaigns to meet fundraising targets.
- Excellent working knowledge of the funding environment (statutory, trusts and foundations) including the ability to develop successful funding proposals in line with funder priorities.
- Organised, self-motivated, detail-orientated, creative, strategic and able to manage multiple priorities to ensure deadlines are met.
- Excellent verbal and written communication skills with the ability to influence confidently and develop compelling 'asks'.
- Committed to championing representation and inclusion at every level and have enthusiasm for working with trustees, staff, volunteers, consultants, and donors.
- Discretion with regard to donor confidentiality and a sensitive and ethical approach to fundraising.
- Dependable and flexible and to positively represent the Portico at a variety of internal and external events.
- Financially literate and able to manage budgets effectively.
- Experienced in the use of CRM databases with good computer literacy and use of Microsoft Office packages – Excel, Word, PowerPoint etc.
- A member of the Chartered Institute of Fundraising - desirable

How to apply

Please submit answers to the following questions:

1. Please set out your skills and experience relevant to this role. Demonstrate this through at least three project examples where you successfully raised funds for capital projects that are similar in scale and delivered in a similar timescale. Please include key challenges and lessons learnt in each instance. Max 4 A4 pages
2. Please list the projects you have been involved in over the last five years. Set out the fundraising target in each instance and define the level of funds were you directly responsible for bringing to that project.
3. How would you approach this role and what would the key activities be in the first few months after appointment? Given the time constraints how would you propose to resource this. We would be open to proposals from companies and individuals who could demonstrate how they might maximise the potential to deliver to the target by resourcing the fundraising task appropriately at key points over the duration of the project. Max 2 A4 Pages
4. If your task is to raise £2m in 13 months, please set out how you would approach this. What would the split of type of funding be, how many prospects would you need to enable success, what would be the key challenges and how would you overcome them? Max 2 A4 Pages
5. How would you set up a Fundraising Circle and motivate Trustees, staff, partners and stakeholders? Max 2 A4 Pages
6. Please complete the pricing schedule (Appendix 1) which has been included as an Excel sheet with this ITT. This sets out roles, rates and resources against the RIBA stages and is linked to the programme. All candidates must use this format for submitting their fixed fee quotation and to outline your resources input and the key tasks you will be undertaking for each RIBA stage.

Please send your response in written format, Equal Opportunities Monitoring form (this information will be held anonymously and will not be used as part of your application) and pricing schedule to matt.ian.johnson@googlemail.com. Copies of the Library's project plan can be found in Appendix 1 and the project brief can be found in Appendix 3.

Tender Assessment

Tenders will be assessed under the following weighting:

- Quality of question responses 70%
- Price: 30% (see Appendix 2)

Scoring Criteria

Questions 1 – 5 will be assessed to see if they have been completed fully and will then be scored according to the following criteria and added together.

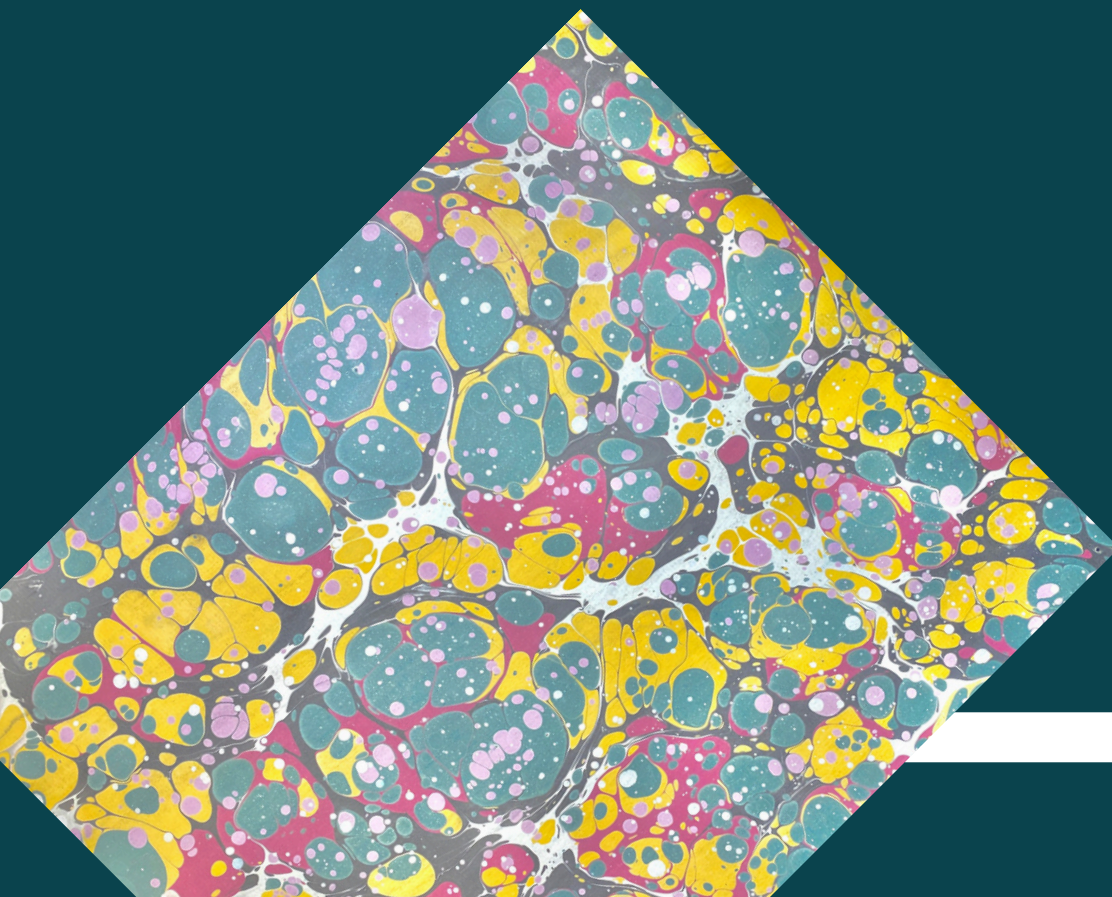
Score	Description
9 – 10	Excellent - Outstanding & competent proposal. Thoroughly convinces with significant and relevant added value. No clarification needed.
7 - 8	Good - Competent proposal. Some limited added value. No clarification required
5 - 6	Satisfactory - Acceptable proposal providing only minimum levels to meet the standard
3 – 4	Poor - Missing Key areas of information and failing to deal with the full scope demonstrating the standards
1 - 2	Very Poor - Seriously incomplete, largely not demonstrating the standard.
0	No response received or unable to demonstrate - based on the answers provided that the standard can be met.

Question 6 will be assessed on a most economically advantageous basis, where both resource levels and cost will be taken into account.

Higher scores will reflect those that can demonstrate the quality, scale, relevance of their experience and value for money.

Programme for Procurement

Stage	Task	Dates
Tender		
	Issue of Tender Documentation	Friday 10th May 2024
	Contractor tender review & submission period	10th May – 7th June 2024 (4wks)
	Receipt of Contractor clarifications	1pm 22nd May 2024
	Client clarifications issued to all	24th May 2024
	Tender submission deadline	1pm Friday 7th June 2024
	Client review period & notification of selected candidates for interview	10th – 21st June 2024
	Interviews (on-line)	Tuesday 25th June 2024
	Notify Preferred Candidate	26th June 2024
	Contract and Project Scope discussions	27th – 28th June 2024
	Appointment	1st July 2024



Programme

Development phase RIBA 0-3		
RIBA 0-1	Start-up meeting	w/c 1st July 2024
	Strategic Definition and Review and Briefing development stages	July – August 2024 approx. 8 weeks duration (inc. 2wk. gateway review)
RIBA 2	Concept Design development stage	September 2024 – January 2025 approx. 20 weeks duration (inc. 3wk. gateway review)
RIBA 3	Spatial Coordination development stage	February – July 2025 approx. 26 weeks duration (inc. 3wk. gateway review)
Break Clause Between RIBA 3-4		
<p>Subject to funding from the Heritage Fund and satisfactory performance, we envisage the role of the Capital Campaign Manager consultant being extended to include the Delivery Phase RIBA 4 - 7. The scope of the role and services will be defined during the delivery phase with a fee to be negotiated based on the day rates set out in your response to this tender. Should the project proceed into the Delivery Phase, applicants should note that there will be a gap in activities between the two Phases. No work will be undertaken in this gap, and no fees will be eligible or paid for any activity over this period.</p>		
Delivery Phase RIBA 4 - 7		
RIBA 4	Technical Design (including procurement of Contractor)	January – August 2026 approx. 36 weeks duration (inc. gateway reviews)
RIBA 5	Manufacturing & Construction	September 2026 - August 2028 approx. 100 weeks duration (inc. gateway reviews)
RIBA 6	Handover (including staff training)	September 2028 approx. 4weeks
RIBA 7	Use	September 2028 – September 2029 52 weeks

Equal Opportunities

At the Portico Library, we believe that the rights of all people, inclusive of age, disability, gender, neurodivergence, race, relationship status, religion or belief, and sexual orientation, should be fully realised and protected. Our vision is to be an organisation that is representative of our city and accessible to all. To help us realise this vision we use a recruiting monitoring process to ensure that the selection process is consistent with the law and the Library's Equal Opportunity Policy. To this end, applicants will be asked to complete an Equal Opportunity monitoring form, which will play no part in the selection process, and will not be seen by any member of the selection panel.

The Portico Library is an equal opportunities employer and we value diversity in our organisation, recognising its critical importance as well as the many strengths in bringing a wide range of cultures, ideas and knowledge together. We want a workforce that reflects the incredible diversity of Greater Manchester's communities and therefore welcome and encourage applications from candidates who are currently under-represented across the heritage sector, including members of the Global Majority, d/Deaf and disabled applicants and individuals from lower socio-economic backgrounds.

Access

The Portico is located on the first floor of its original 217-year-old Listed Building. It is our priority to ensure the Library can be as welcoming and accessible as possible for everyone. Please read below for current access information about our building.

- The Library's main entrance is via the green doors on Charlotte Street at the corner with Mosley Street. There is an intercom button next to the doors. Please press this button for entry.
- There are 32 steps from the main entrance to the Library and currently no lift. There is a handrail, and a chair is placed on each landing. Toilets are available for visitors, located on the landings.
- There is a stair-lift at the Library's back entrance on Back George Street, accessed by a portable ramp, but currently no step-free or accessible toilets.
- 6 pay and display parking spaces are available nearby, on the same side of Charlotte Street as the Library. These are not dedicated or bookable disabled parking bays, but Blue Badge holders may park here free of charge.
- An audio-described tour of the library is available to listen to at www.theportico.org.uk/visit and is also available with headphones from the reception desk.