STEAMSHIP SHIELDHALL

The King's Award for Voluntary Service

Made possible with Heritage Fund

STEAMSHIP SHIELDHALL CHARITY

Steamship Shieldhall: towards 2055, the next 10 years

Brief for Fundraising Services

The National Lottery Heritage Fund

Development Phase

Version FINAL

March 2026

Our project is made possible with The National Lottery Heritage Fund. Thanks to National Lottery players, we have been able to develop plans to conserve the Shieldhall and increase its relevance to our audiences

BRIEF FOR A DEVELOPMENT PHASE FUNDRAISER FOR STEAMSHIP SHIELDHALL: TOWARDS 2055, THE NEXT 10 YEARS PROJECT

Steamship Shieldhall is seeking to appoint an experienced Fundraiser to work closely with the client team, professional services team and project manager to secure match funding for our National Lottery Heritage Fund (Heritage Fund) "Steamship Shieldhall: towards 2055, the next 10 years" project. This brief sets out the requirements for the commission.

1. Background

SS Shieldhall is the country's last steam powered cargo and passenger ship and the largest operational steamship in Europe. Shieldhall is unique and of recognised national significance as one of just 200 vessels forming the National Historic Fleet.

Having been a working vessel since 1955, she was purchased from Southern Water and saved from the scrapyard in 1988 by The Solent Steam Packet Limited, an Industrial and Provident Society formed to own, preserve and operate the ship. The Solent Steam Packet Limited later became a Community Benefit Society and in 2020 a new registered charity 'Steamship Shieldhall Charity' was established to take over responsibility for all aspects of preserving and operating the ship, including fundraising, while ownership remains with The Solent Steam Packet Limited.

The Solent Steam Packet returned her to operational condition in 1991 and since this time the ship has been taking passengers on board for a unique programme of steam-powered excursions.

The Charity recently reviewed options for Shieldhall's future home, with the conclusion that remaining in Southampton presented the optimum mix of opportunity and future sustainability. Some of those opportunities are now being realised with the shore side access improvement works now completed alongside Shieldhall and a productive and engaged relationship with Southampton Port operators, ABP.

Shieldhall is berthed year-round in Southampton and welcomes passengers and visitors on board from 110 Berth in the Western Docks. She is capable of carrying up to 220 passengers and from spring to autumn each year she operates a programme of public sailings ranging from two hour trips to full day cruises. She is also open for occasional alongside events, such as Heritage Open Days, and is available for private charters. In addition, she can be hired for use alongside such as for training activities, meetings, functions and filming.

In 2024/25 the ship welcomed 4,000 paying passengers on board.

The charity is wholly run and led by volunteers and has an active volunteer base of more than 100.

The focus of the Heritage Fund project is to undertake capital works that will allow her to continue in operational condition and to reach out to new audiences, in particular the people of Southampton, to engage them with this characterful 70-year old vessel which embodies the days in which steamships were the main means by which cargo was carried around the globe. Key elements of the project include:

- Develop and deliver a range of activities designed to engage core and priority audiences with the ship and her stories
- Hull and superstructure steelwork repair and replacement and installation of new fuel tanks
- Update aged DC electrical wiring and replace life-expired anchor chains to address operational and safety risks
- Improve environmental performance through enhanced arrangements to the ship's grey water management and installation of solar panels on a quayside building.
- Broadening income streams through the development of new revenue-generating activities.

The overall project has been estimated to cost circa £2.2 million (excl VAT), with an anticipated completion in 2030. The Development Phase of the project is expected to last from January 2026 until February 2027.

2. Audiences and Activities

Awareness of Shieldhall within her home city is low and so it is a key ambition of the project to raise awareness of and engagement with Shieldhall amongst residents of Southampton.

Priority Audiences
All residents of Southampton and in particular

- Southampton families
- Young people through formal learning (KS2)
- Lower income adults and families
- Current and ex-seafarers living in Southampton
- Southampton's Polish community

Core Audiences
The core audiences for Steamship Shieldhall are:

- Older adults
- Families (often grandparents with grandchildren)
- Steam enthusiasts
- Other specialist interest groups

These are the people who currently come on board and underpin the business model. Through the project we will also look to nurture these visitors and increase their numbers.

In our Development Phase application to NLHF we outlined a range of potential activities that might be developed and delivered in order to increase awareness of, access to and engagement with Shieldhall. These include:

- Develop an Engagement & Learning Strategy for our organisation.
- Develop and deliver an education offer aimed at local primary schools.
- Work with a children's author, illustrator and families from Southampton to co-create characters, book, trail and storytelling.
- Create a 'Shieldhall on Shore' outreach offer.
- Establish activities and events designed to capture the interest of Southampton residents.
- Work with representatives of the Merchant Navy Welfare Board, Merchant Navy Association and Veterans Outreach to establish activities and opportunities to support the mental health and wellbeing of current and ex-seafarers.
- Engage with groups from Southampton's most economically disadvantaged neighbourhoods.
- Reach out to Southampton's large Polish community; building on the opportunities created through Poland's strong maritime and engineering tradition.
- Capture the stories and memories of people who have known Shieldhall during her 70 year history.
- Develop a Shieldhall Guided Tour.
- Employ an Engagement & Learning Officer.
- Create an Engagement & Learning programme which will be highlighted on our website to improve promotion of these opportunities.
- Establish and upskill a team of volunteers to support an Engagement Officer to deliver our engagement and outreach activities during the project and beyond.

3. The scope of the work

Shieldhall requires specialist fundraising consultancy support to raise sufficient funds to help secure the Heritage Fund Delivery Phase application.

The fundraiser will work closely with the volunteers to:

- Create a fundraising strategy with a detailed action plan with outputs and then deliver/secure pledges for the £250k of funding needed for Shieldhall to proceed with the project. The aim is to have at least 80% of this total i.e. £200k secured by the time of Delivery Phase application, currently scheduled for February 2027

and 100% by the Committee Meeting in June 2027 to reduce risk and avoid delays at permission to start.

- Review the project and evaluate assumptions on different fundraising income/prospects including public grants, trusts & foundations, corporates and major donors, to optimise funding opportunities for the project.
- Create a compelling Case for Support.
- Research and cultivate funding prospects.
- Prepare and submit high quality well-researched funding applications and bids.
- Prepare an overarching hierarchy of giving table, benefits and acknowledgement
- Provide support to the Shieldhall volunteers and assist with fundraising content for the Heritage Fund Delivery Phase application documentation.
- Plan and produce an individual giving programme for the purposes of the project and to continue beyond the project.
- Consider potential for a legacy campaign to support long-term giving.
- Develop a major donor policy and plan, including a major donor expectation and acknowledgement protocol and advise volunteers on long-term stewardship.
- Leave a legacy of fundraising skills and understanding with the trustees and volunteers
- Advise, support and develop Shieldhall's fundraising in-house skills and capacity, working with a small number of nominated volunteers
- Ensure all fundraising is carried out in accordance with the Code of Fundraising Practice and Fundraising Regulation.

4. Summary of outputs

The consultant will produce a fundraising strategy, case for support, a hierarchy of giving table, an individual giving programme and a legacy campaign, a major donor policy and plan, and raise sufficient funds to help secure the Delivery Phase of the project. They will also make recommendations for ongoing fundraising to secure the longer-term future of the ship.

The consultant will report every period on secured amounts against targets with a view to having over 80% of the required match-funding secured at the time of the Delivery Phase submission.

The outputs will be the copyright of the client. Strict confidentiality should be maintained with regard to legal and financial information provided by or obtained for the project but the rest of the Plan will be made publicly available.

The consultant will clear the copyright for any illustrations or other material used.

The consultant will produce the outputs in electronic form.

5. Key relationships

The Fundraising work is part of the work being undertaken during the Development Phase of the Heritage Fund project and will form part of the resulting Delivery Phase submission. Other work being undertaken during the Development Phase includes the production of:

- Ship repair and design specifications
- Activity Plan
- Business Plan
- Volunteering Strategy

The different strands of work will be coordinated centrally by a Project Manager and the Fundraiser will be expected to attend a limited number of online Project Team meetings. Regular online meetings with the client will be required.

An organisation chart is shown in Appendix A, with an outline development phase schedule in Appendix B.

An external, part-time, grant-funded Business Development post features in the development phase project team, with a specific focus on increasing revenue generation for Shieldhall.

6. Available documentation

Documents available on request that formed part of the Development Phase application are:

- The Heritage Fund Development Phase application form (2025)
- Business Plan

7. Requirements of the submission

Your proposal should include:

- Outline your track record of similar commissions including two case studies of recent, relevant commissions including relevant lessons learnt.
- A methodology that meets the brief.
- Your approach to the commission, including the establishment of local contacts and engagement in face-to-face meetings
- Sample Fundraising Strategy and Case for Support
- Outline timescale for the commission.
- CVs of all personnel who will deliver the services.
- Fees to complete the project. Please indicate a lump sum to completion (excluding VAT, but including expenses), and daily rate(s).
- Details of Professional Indemnity and Public Liability Insurance.
- Two referees from recent projects.

Online interviews will be held to clarify submissions. Interviews will be on 17 April 2026.

8. Skills and experience required

Experience of:

- Successful fundraising for NLHF-funded projects of a similar scale
- Writing successful Fundraising Strategies for similar sized projects
- Working with heritage organisations with a large volunteer base
- The National Lottery Heritage Fund grant process.

Skills we are looking for among the consultant team are:

- excellent communication skills
- excellent written skills
- excellent interpersonal skills
- delivery of projects on time

9. Selection criteria

Tenders will be evaluated on a 30/70% cost/quality basis.

Case studies • Relevance and quality of case studies • Relevant lessons learnt	25%

Methodology including approach to: • A methodology that meets the brief. • Approach to the project, including the establishment of local contacts and engagement in face-to-face meetings • Sample Fundraising Strategy and Case for Support • Outline timescale for the commission.	20%
Experience and skills demonstrated through: • Successful fundraising for NLHF-funded projects of a similar scale • Writing successful Fundraising Strategies • Working with heritage organisations with a large volunteer base • Knowledge of National Lottery Heritage Fund grant process. • CVs of key personnel	25%
Price	30%

The scoring approach against Price will be as follows:

$$\text{Score} = 30\% \times \frac{\text{£lowest tender sum received}}{\text{£individual bidder's tender sum}}$$

A desktop assessment will be carried out of all tenders received against the criteria outlined above. Where questions are to be scored and weighted, each question and sub-question will be scored in accordance with the scoring matrix below. The score will then be awarded and the percentage weighting applied to give the weighted score for that question.

Capability	Response	Remark	Marks
Supplier is likely to be able to meet the needs of the Client.	Response exceeds the anticipated answer and is completely convincing and relevant to the Project with substantiation from independent sources and references.	Absolute Confidence	10
Supplier is likely to be able to meet the needs of the Client.	Response comprehensively answers the question and is convincing and relevant to the Project.	Confidence	8
Small risk that Supplier will not be able to meet the needs of the Client.	Response sufficiently answers the question without omission and is generally convincing and relevant to the Project.	Minor Concerns	6

Moderate risk that the Supplier will not be able to meet the needs of the Client.	Response has minor omissions and is in part(s) unconvincing or irrelevant to the Project.	Moderate Concerns	4
Significant risk that the Supplier will not be able to meet the needs of the Client.	Response has major omissions and is largely unconvincing or irrelevant to the Project.	Major Concerns	2
Supplier will not be able to meet the needs of the Client.	No response or misleading response provided.	Not Acceptable	0

10. Management of the commission

The commission will be managed on a day-to-day basis by the Project Manager and Shieldhall's lead volunteer.

Appendix A. shows the Development Phase organisational chart, with a Development Phase schedule in Appendix B.

We expect an in-person commissioning meeting, regular online progress meetings and regular communication throughout the project. A limited number of meetings may be required onboard Shieldhall.

11. Date of submission and timescale

Tenders must be submitted by no later than 30th March 2026 via email, WeTransfer or other file sharing system to joanna.w@conservationplus.org and the email subject title to state "Shieldhall: Fundraiser".

During the tender period, should the tenderer wish to present questions or seek clarification on any information contained within this pack, requests will only be considered up to 23rd March 2026. Please submit any queries to joanna.w@conservationplus.org.

Interviews: in-person interviews will be held to clarify submissions. The planned interview date is 17 April 2026.

A site visit to Shieldhall during the tender period is available on following dates:

- Wednesday 11th March, after 1400
- Wednesday 18th March, after 1400
- Friday 20th March, after 1300

If you would like to arrange to visit Shieldhall, please contact Colin Ness (colin.ness@ss-shieldhall.co.uk) in advance to arrange access.

We expect the work to begin in May 2026 and end with the Delivery Phase application submission, with the Fundraising Strategy, Case for Support and a tracker of what has been applied for, received and future applications being produced in time for the Heritage Fund Development Review, which is anticipated to be in mid-December 2026.

The completion date for the project is submission of the Delivery Phase application, scheduled for February 2027.

12. Fee

The budget for Fundraising Services is circa £20,000 - £25,000 excluding VAT but including all expenses. A supporting budget of circa £5,000 is available to support fundraising activities/events, if required.

We would expect you to quote a lump sum price with a staged fee proposal including day rates for all key personnel, allocated resource days and any allowances for expenses.

Please complete the enclosed Form of Tender (Appendix C).

13. Terms and conditions

The contract will run from appointment to the end of the Development Phase and submission of the Delivery Phase application to NLHF.

Note that there will be a Development Review with the Heritage Fund during the Development Phase. The Development Review is expected to be mid-December 2026. It is possible there may be feedback from the Heritage Fund review that needs to be incorporated into the documents at this point. The supplier must factor this into their resource profile.

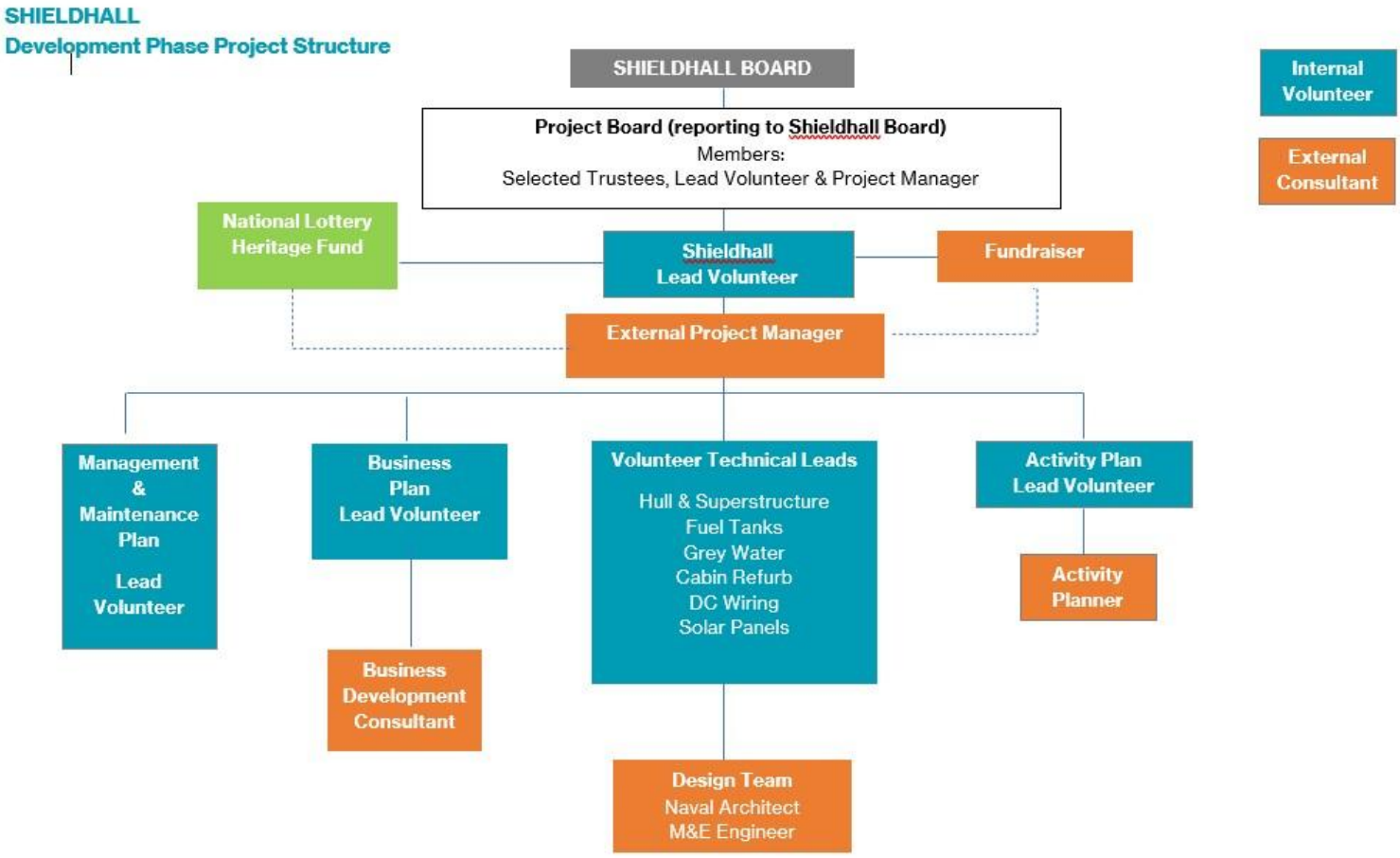
Consultants should note that the timetable is indicative only and changes in the timeline will not result in additional fees but rather a reprofiling of the agreed staged payments.

14. Further information

For further information or queries, please contact joanna.w@conservationplus.org

If you would like to arrange a site visit to the ship in advance of tender submission, please contact Colin Ness (colin.ness@ss-shieldhall.co.uk).

Appendix A: Development Phase Project Structure



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Appendix B: Development Phase Programme

Steamship Shieldhall: towards 2055, the next 10 years

Development Phase programme	
Task	**Date**
Heritage Grant award confirmed	December 2025
NLHF Permission to Start process	27 Feb 2026
Ship Design RIBA 1-3	
Procure Consultants	March – April 2026
Ship repair & design stage	April – Sep 2026
CTR 050 – Tank Design	Oct – Nov 2026
Complete all design & specifications	Nov – Dec 2026
Develop tender specification packages	Dec 2026 - Jan 2027
2026 Dry docking	April 2026
Develop Activity Plan	
Commence Activity Planning orientation etc	May 2026
Consultation	May – Aug 2026
Activity planning	Aug – Oct 2026
Develop Action Plan & budget	Oct – Nov 2026
Develop Evaluation Framework / Plan	Oct – Nov 2026
Draft Activity Plan	Dec 2026
Finalise Activity Plan	January 2027
Other activities	
Appoint Business Development Consultant	Apr 2026
Business: Understanding & strategy	May 2026
Develop new business offer/network	May – July 2026
Promote & grow business	July – Dec 2026
Develop new Business Plan	Oct – Dec 2026
Draft Heritage Fund app form	Jan 2027
Delivery Phase cost plan	Dec 2026 – Jan 2027
Update MMP	Sep – Nov 2026
Fundraising	
Develop Fundraising Strategy	May – Jun 2026
Case for Support	July 2026
Submit funding applications 80%	July – Jan 2027
Complete fundraising campaign - final 20%	Jan – May 2027
NLHF Development Review (RIBA 3)	December 2026

Development Phase Completion	
Submit Delivery Phase app	Feb 2027
Development Phase Evaluation Report	Feb 2027
NLHF Project Completion Report	Feb 2027
Compile & Submit Final Claim	Mar 2027

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APPENDIX C: Form of Tender

Please complete this form and include it with your responses to the questions above.

Project name:

Professional Service:

Name of Tenderer:
I/We, the undersigned, do hereby offer to execute and complete the above mentioned professional services in strict accordance with the Schedule of Services for the following lump sum fee:

£ ___ plus VAT (delete if VAT not applicable) for the development phase
Confirm figure in words: _____ plus VAT (delete VAT if not applicable)

Resources
Please state the number of days intended for the delivery phase:

Day Rates
Please state the number of days and day rates intended for the delivery and development phases in the table below:

	Development phase	
Team	**Day Rate £**	**No. of days**
Director/ Partner		
Senior Consultant		
Consultant		
Other – specify		
Total Days	**n/a**	

The above day rates will be utilised to negotiate any additional works that may be required if deemed to be beyond the reasonable scope of the works specified. All day rates are to be based on a 7.5 hour day and are to include allowance for disbursements.

Expenses and Disbursements
The fee offer is to include all expenses and disbursements (including printing charges).

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Offer Period

This tender/ offer is to remain open for a period of 90 days from the date fixed to the return of tenders. Dated this _____ day of _____20__

Tenderer to provide responses. Some are pass/ fail	
Name of firm or company	
Postal address	
Registered address (if applicable)	
Company number (if applicable)	
Please indicate if you are: a sole trader, partnership, Public or Private Limited Company or other type of organisation	
Main contact	
Contact telephone number	
Contact email address	
Please indicate your level of Employer's Liability Insurance, the policy number and expiry date	
Please indicate your level of Public Indemnity Insurance, the policy number and expiry date	
Please indicate your level of Professional Indemnity Insurance, the policy number and expiry date	
Signature of authorised person	
Name of authorised person	
Capacity in which signed	