Yellow highlight – insert text/number as appropriate

Grey highlight – comments/guidance for you to consider, then delete

**Template brief for short-term project consultant**

This template outlines some of the key sections to consider in preparing a brief for a specific piece of work. The details will vary depending on your project and the work for which you are going out to tender and your development manager can help to refine the brief.

**Name of group and title of brief**

**Background**

* Describe the community group, how long you have been established, your purpose, numbers on the board, number of members.
* Describe the asset under consideration as best you can – include maps and plans if available.
* Give any other information including the cost of the purchase, whether the asset has been independently valued, details about current owner, and information about what dialogue if any there has been with the owner.
* Provide a summary of the overall aims of the project and include the expected timescales.

**Purpose of the contract**

The aim of this commission is to assist insert name of organisation in the development of the above project, specifically:

Add/delete/rephrase as appropriate from the suggestions below

Options appraisal

* To look at options for developing the asset and make recommendations as to preferred uses, including what would happen if the community chooses not to go ahead with the purchase.
* To research and report on various ownership and management scenarios and recommend the most suitable for this project.

Governance issues

* To analyse the skills and resources within the community and the Company Board, identify any gaps in skills and resources available with suggestions for addressing these.

Feasibility and business planning

* To review the potential to develop housing/ tourism or other uses of the asset, including the appropriate business model for running these options.
* To assess the risks associated with community ownership and management of the asset, and recommend appropriate mitigation and management.
* To review funding availability for the proposed project/acquisition and prepare a detailed funding strategy and delivery plan. This should include considerations of the costs of running and managing the asset and opportunities to generate income from the asset.
* To prepare a five year business plan which incorporates initial revenue costs, capital costs to create the facilities, ongoing revenue and maintenance costs for the project, and risk analysis.

Community consultation

* To consult members of the public and local tourism, business and community organisations to raise awareness of the project; garner and report on local perceptions of the project; explore ideas for use with the local community; understand local need for new facilities.

Technical assessment

* To carry out a soil contamination/hydrology/other technical survey of the site.
* To prepare documentation as required to achieve RIBA stage number
* To carry out a structural survey of the building(s)
* To prepare some initial costings for development of the site for the proposed options.

**Additional relevant information to the commission**

* Set out what information you already hold and what additional surveys/commissions are being undertaken simultaneously. You can list the documents that will be available to the consultant in an appendix.
* Include how this work is being funded, or if it is subject to funding, and whether the funders have any specific requirements for the commission.
* What are the timescales for delivery? Are the funders imposing timescales?
* Are there other external factors – other pieces of work that will impact on timescales, in particular providing information to the consultant to enable them to perform?
* Do you want to stipulate methodology to be followed, such as community consultation events, external stakeholders to be consulted?

**Key Skills**

The consultant/consultancy team will be required to demonstrate skills and experience in the following:

Specific requirements will follow on from the purpose of the contract outlined above, some general skills are included below. Add/delete/rephrase as appropriate.

* The economics of crofting estate management and diversification potential
* Working with community organisations involved in owning and managing assets
* Working with community organisations involved in developments on forestry land
* Methods of effective communication with volunteers in community organisations and with the wider community
* The economy, culture and heritage of the local area
* Preparing business plans to be used in support of funding applications

**Management and outputs of the contract**.

* Consider whether the work requires to be done in stages with potential breakpoints for review.
* Consider how many meetings with the consultants should be included within the brief and who this will involve? Visits to remote locations can take one or two days of a consultant’s time and, with travel, can quickly drain the budget. Consider what can be done remotely and by phone/Skype.
* Do they need to appoint sub- consultants for specialist areas of work eg architects. If so, who will they use and are their costs included within the overall fee?
* Consider the need for insurances and risk assessments for the work. Ask the consultant to confirm they have the necessary insurances.
* What will be the specific product at the end of the contract, and in what format should this be provided (eg how many copies, electronically/hard copies of their report)?

The successful applicant will report to the board throughout the contract on a regular basis to be agreed with the board. Reporting can take the form of bullet points relating to progress achieved, however any slippage to planned timescales must be highlighted with corrective action outlined.

Outputs required are:

Add/delete/rephrase as appropriate

* An options appraisal and feasibility report for use of the asset and its ongoing management
* A five year business plan including funding strategy and risk analysis
* A structural survey including cost of works

The commission will be managed by name of your group, and all outputs outlined above should be submitted to named contact, as follows:

* Two hard copies of the draft and final report/business plan will be required, as well as in electronic format.
* A summary of the report/business plan, less than two A4 pages in size, will be provided for the purpose of informing the public and members of the Community Company.

The information gathered during the commission, including draft and final reports, shall remain

the sole property of name of your group.

**Remuneration and conditions**

* The work is offered as a fixed-term contract, dependent on securing funding to carry out the work.
* The successful candidate will be self-employed and responsible for his/her own tax and personal insurance
* Payments will be made as follows:
* 50% on receipt and acceptance of draft BP, and the remainder upon acceptance of the final plan

**Procedures for tendering**

The response to this briefmust be submitted by time and date to the nominated contact person(s), telephone number: xxxxxx, e-mail : xxxxxxx

Submissions should include:

* Name, contact details and background of the lead consultant
* Breakdown of costs for conducting this study, including number of days allocated per task, all fees, expenses, charges, meetings, presentations and interviews, including VAT.
* A timetable showing the various milestones including the anticipated dates of submission of draft and final reports.
* Examples of similar tasks/studies undertaken recently
* The skills and knowledge of the members of the team
* Two names of contacts from two separate organizations for whom similar studies have been undertaken, one to be within the past year.
* other relevant information that you require

If you wish to discuss this opportunity before tendering please contact named person.

Submissions will be evaluated on a quality/price basis (70:30) and will include the following:

(i) Understanding of the brief;

(ii) Methodology and approach;

(iii) Skills and experience of the team;

(iv) Price

Add/delete/amend as required. Give as much detail as you can on the assessment criteria and make sure the quality:price weighting and all criteria match those in your scoring sheet. See ‘Process for selection and scoring’.

**Timeline**

The anticipated timetable for the study is:

* Distribute brief to consultants date
* Final date for tender submissions date

(allow around 4 weeks from issuing the brief and invitation to tender for tenders to be submitted, or 6-8 weeks for larger projects)

* Appointment of consultant date
* Inception meeting date
* Submission of interim report date
* Submission of draft final report date
* Submission of final report date
* Any other requirements, eg regular meetings with the contact person/whole board, presentations to the board/community

Details of actual timescales will be agreed with the selected Consultant before the Contract is issued.