



## **STEAMSHIP SHIELDHALL CHARITY**

# **Brief for freelance Commercial Manager**

**Steamship Shieldhall:  
towards 2055, the next 10 years**

**The National Lottery Heritage Fund**

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May 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 FREELANCE COMMERCIAL MANAGER

### STEAMSHIP SHIELDHALL: TOWARDS 2055, THE NEXT 10 YEARS

Steamship Shieldhall is seeking to appoint an experienced freelance Commercial Manager to generate additional income to support the ongoing conservation, sustainability and operation of the ship. The commission is an important element of the “Steamship Shieldhall: towards 2055, the next 10 years” project which is supported by a Development Phase grant from The National Lottery Heritage Fund (Heritage Fund).

This brief sets out the requirements for the commissioning of a part-time, freelance Commercial Manager. The appointment is intended to cover both the Development Phase and the first two years of the Delivery Phase of the project but **will include a break-clause between the two phases**. The Delivery Phase contract is contingent on a successful Delivery Phase grant application to the Heritage Fund and a satisfactory performance review.

The successful supplier will have the right to set their own hours of work and will determine in agreement with the Shieldhall charity how best to undertake the work. The worker is responsible for paying their own Income Tax and National Insurance contributions. The service could be provided through self-employed individual, partnership or limited company.

#### 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 scrapyards 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. Principal 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 cost estimate for the overall project is circa £2.2m million excluding VAT, with an anticipated completion in 2030. The Development Phase of the project is expected to last from January 2026 until spring 2027 with the Delivery phase starting from summer 2027.



## 2. Current Position

Shieldhall's primary income stream is ticket sales from a public sailing programme. Alongside this, income is generated from other areas such as catering, static events/hires, membership of the charity, and fundraising/donations.

The main areas of expenditure are conservation of the vessel (including annual dry docking), operating costs relating to sailings, marketing, overheads, insurance and volunteer expenses.

Any profits are reinvested into the organisation. However, in the context of a challenging external financial environment, we are seeing costs rising and our margin reducing. In addition, changes to legislation mean that Shieldhall must now be dry-docked annually (previously bi-annually), bringing very significant associated cost challenges. Overall dry docking costs are circa £100,000 per year.

As custodians of one of the country's most historic vessels, we are committed to maintaining Shieldhall in operational condition, to continue to be experienced and enjoyed by future generations. To meet this challenge, we are seeking to explore new ways of generating income, broaden our revenue base and improve the organisation's sustainability.

## 3. The scope of the work: Development and Delivery Phases

The Commercial Manager will be responsible for identifying and realising new opportunities for revenue generation for Steamship Shieldhall, as well as supporting Shieldhall's experienced volunteers with maximising income from existing activities.

The freelancer will develop a network of contacts (both new and existing) to attract new clients, research new business opportunities and oversee growth projects to develop earned income to a level where it is making a substantial net contribution to the organisation. The initial target is £50k p.a., with an expectation of an increase in subsequent years to cover maintenance costs and replenish reserves.

Ideally we are seeking an experienced freelancer who understands the heritage sector, particularly in the local area, and can lead consultation with local groups and businesses to understand their needs, provide familiarisation tours with Shieldhall resulting in securing hires and repeat bookings.

Opportunities that we anticipate the consultant will explore and develop include, but are not limited to:

- Driving growth of hospitality use of Shieldhall, 2 events per month being an initial target



- Building awareness and use of Shieldhall as a venue for cultural and business events and activities
- Further develop and explore revenue generating opportunities in the use of Shieldhall for training activities
- Explore the scope for business sponsorship of Shieldhall sailings and events
- Establish contacts with filming location agencies
- Develop private charter opportunities, 2 charters per sailing season being an initial target
- Build offers for groups/coaches
- Applicants should be good communicators with the ability to develop promotional content and promote the ship through its social media, both existing and new.

The focus of this role is very much hands-on with an emphasis on developing existing and securing additional revenue streams. We are not seeking development of detailed and theoretical business plans although the Commercial Manager should produce a clear, succinct strategy and implementation plan (referred to elsewhere as Commercial Development Strategy) which includes proposed deliverables/events, costs, targets for numbers/types of events and level of net income generation to be agreed.

This plan will feed into the overall Shieldhall Business Plan being developed in-house by our experienced and knowledgeable volunteers, led by our volunteer Trading Director. The revised Business Plan will need to be completed by December 2026 as it forms an important element of the Delivery Phase application to the Heritage Fund.

We expect this role to commence in July 2026 and end with the submission of the Delivery Phase application, currently scheduled for spring 2027. The Delivery Phase appointment will be subject to a successful award of funding by the Heritage Fund and a satisfactory performance review.

During the Delivery Phase we expect the Commercial Manager to build on what was learnt during the Development Phase and continue with development of commercial activities to achieve the agreed targets.

For the avoidance of doubt, fundraising is not part of this commission. There is a separate commission whose focus is on raising the partnership funding for the capital project and developing a legacy scheme.

#### **4. Summary of outputs: Development and Delivery Phases**

Evidence of research into and identification of commercial opportunities, including local face-to-face meetings as required.



A clear strategy and plan for commercial development (Commercial Development Strategy) with a clear programme, targets and financial projections (not detailed market research and analysis unless essential to support proposals).

Shared list of contacts, prospects and communications with individuals and organisations.

Submission of brief progress reports each period, and attendance at online project progress meetings (monthly and not exceeding an hour).

Delivery of revenue generating events and activities, with Shieldhall's Customer Experience Team and Trading Director. We are expecting the freelancer to work with volunteers to lead prospective hirers on familiarisation trips and help with the planning and delivery of events and commercial activities onboard.

Increased social media and marketing presence with relation to driving commercial activities and opportunities.

## **5. Key relationships**

The role will work closely with our Customer Experience Team, which supports our events and activities, and with Shieldhall's Trading Director, for the provision of catering and a licensed bar for clients.

The freelancer will also establish and maintain local and regional contacts associated with business development opportunities. The consultant will also need to liaise and coordinate with the project's Activity Planner to ensure proposals, costs, income and visitor numbers align. More information on Activity Planning in Heritage Fund projects can be found here [Activity plan good practice guidance | The National Lottery Heritage Fund](#). The successful consultant is not expected to be an expert on Activity Plans.

## **6. Available documentation and site visit**

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

- Business Plan

Further information on Shieldhall and location / access can be found at [Steamship Shieldhall – Experience the golden age of steam](#)

A site visit to Shieldhall during the tender period is strongly recommended and can be arranged via email: [Joanna.w@conservationplus.org](mailto:Joanna.w@conservationplus.org)



## 7. Requirements of the submission

Your submission should include:

1. approach to the brief.
2. a methodology with clear timetable that meets the brief.
3. CVs of all personnel who will deliver the services.
4. Your track record of similar projects including two brief case studies.
5. two referees from recent projects.
6. Completed Form of Tender (Appendix D) setting out a full breakdown of costs, including:
  - i. daily rates for all personnel
  - ii. any allowances for expenses
  - iii. allocated resource days
  - iv. all sums to be stated exclusive of VAT
  - v. confirm whether VAT is applicable.

Please limit your application to a sensible number of A4 sides, and do not send generic company information.

## 8. Skills and experience required

Applicants should be good communicators with the ability to develop promotional content and promote the ship through its social media, both existing and new.

Demonstrable experience of successful commercial development, including a track record of developing and implementing relevant income-earning opportunities within the context of the charitable or heritage sector, particularly in the local area.

Ability and willingness to attend Shieldhall, meetings and activities locally.

Ability to lead consultation with local groups and businesses to understand their needs, provide familiarisation tours with Shieldhall resulting in securing hires and repeat bookings.

Financially literate and able to communicate a product, service or opportunity to prospective customers, partners, sponsors etc, demonstrating tact, diplomacy and powers of persuasion.

Self-motivated, with a good sense of team spirit and able to communicate effectively with Shieldhall's volunteers and members.

An awareness of the opportunities and challenges that arise from working with a wholly volunteer-led organisation.

## 9. Selection criteria

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

|                                                                                                                                                                                                                                                                                                                                        |     |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|
| Overall quality of the bid and the extent to which it demonstrates understanding to fully satisfy the brief.                                                                                                                                                                                                                           | 10% |
| Approach and methodology for the commission including approach to: <ul style="list-style-type: none"> <li>• Researching and identifying opportunities for income generation</li> <li>• Preparing a business development plan</li> <li>• Developing and promoting specific offers and proposals for income generating events</li> </ul> | 30% |
| Relevant experience and skills demonstrated through: <ul style="list-style-type: none"> <li>• CV</li> <li>• Track record / case studies of previous projects</li> <li>• Previous experience of successfully developing income generation within the heritage, leisure or cultural sector</li> <li>• Referees</li> </ul>                | 30% |
| 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 |

It is anticipated that the desk-based assessment will be supported by an online interview to clarify and validate submissions.

## 10. Management of the commission

The commission will be managed on a day-to-day basis by Shieldhall's Trading Director supported by our external project managers.

Appendix A: Development Phase organisational chart

Appendix B: Development Phase schedule

Appendix C: Delivery Phase organisational chart

Appendix D: Form of Tender

A face-to-face start-up meeting will be required, followed by online progress meetings every period with the business plan lead volunteer.

Attendance at Project Board and Finance & Fundraising Committee meetings may also be required from time to time, occasionally in person.



## 11. Date of submission and timescale

Tenders must be submitted by no later than **midday on the 22<sup>nd</sup> June 2026** via email or WeTransfer or other file sharing system to [joanna.w@conservationplus.org](mailto:joanna.w@conservationplus.org) and the email subject title to state "Shieldhall: Commercial Manager".

During the tender period, should the tenderer wish to present questions or seek clarification on any information contained within this pack, please email: [joanna.w@conservationplus.org](mailto:joanna.w@conservationplus.org).

We expect the commission to begin in July 2026 and complete spring 2027.

## 12. Fee

The budget for the commission in the Development Phase is circa £20,000, excluding VAT but including all expenses.

The budget for the first two years of the Delivery Phase is circa £40,000 excluding VAT but including all expenses.

Please use the Form of Tender to detail day rates, number of days allocated to the project and expenses.

## 13. Terms and conditions

The contract will run from appointment to the end of the Development Phase. Note that there will be a Development Review with the Heritage Fund during the Development Phase of the project, expected to be Expected to be December 2026 or January 2027. A draft of the Commercial Development Strategy will be needed for the review. It is possible that there may be feedback from the Heritage Fund that will need to be incorporated into the document at this point. The supplier must factor this into their resource profile.

Suppliers should note that the timetable is indicative only at this point and changes in the timeline will not result in additional fees but rather a reprofiling of the agreed resource commitments and associated staged payments.

All invoices to be submitted on a monthly or staged fee profile basis with 28 day payment terms.

The successful supplier will have the right to set their own hours of work and will determine in agreement with the Shieldhall charity how best to undertake the work.



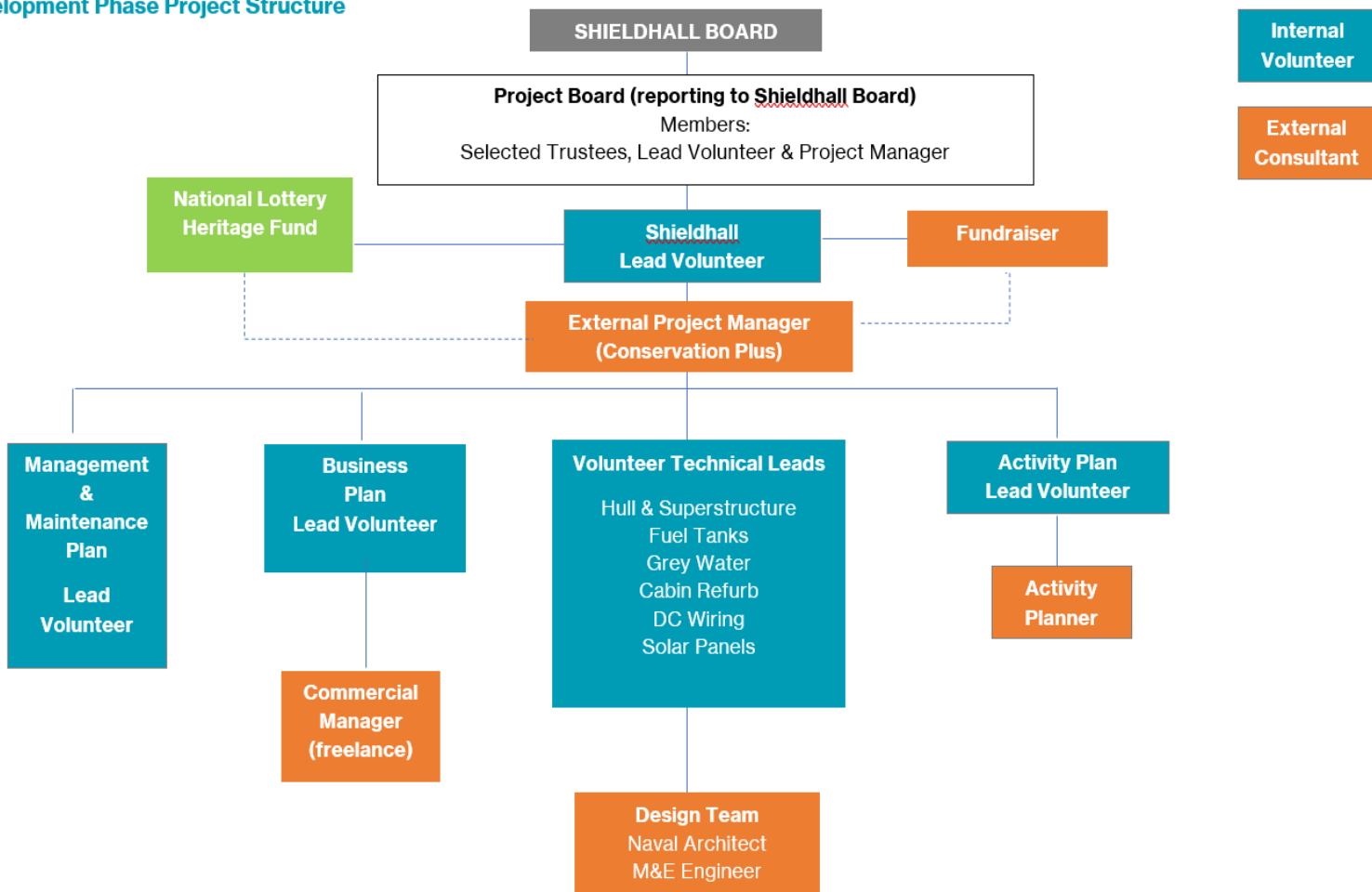
The worker is responsible for paying their own Income Tax and National Insurance contributions. The service could be provided through self-employed individual, partnership or limited company.

#### **14. Further information**

For further information, please contact [joanna.w@conservationplus.org](mailto:joanna.w@conservationplus.org).

## Appendix A: Development Phase organisational chart

### Development Phase Project Structure



## Appendix B: Development Phase schedule

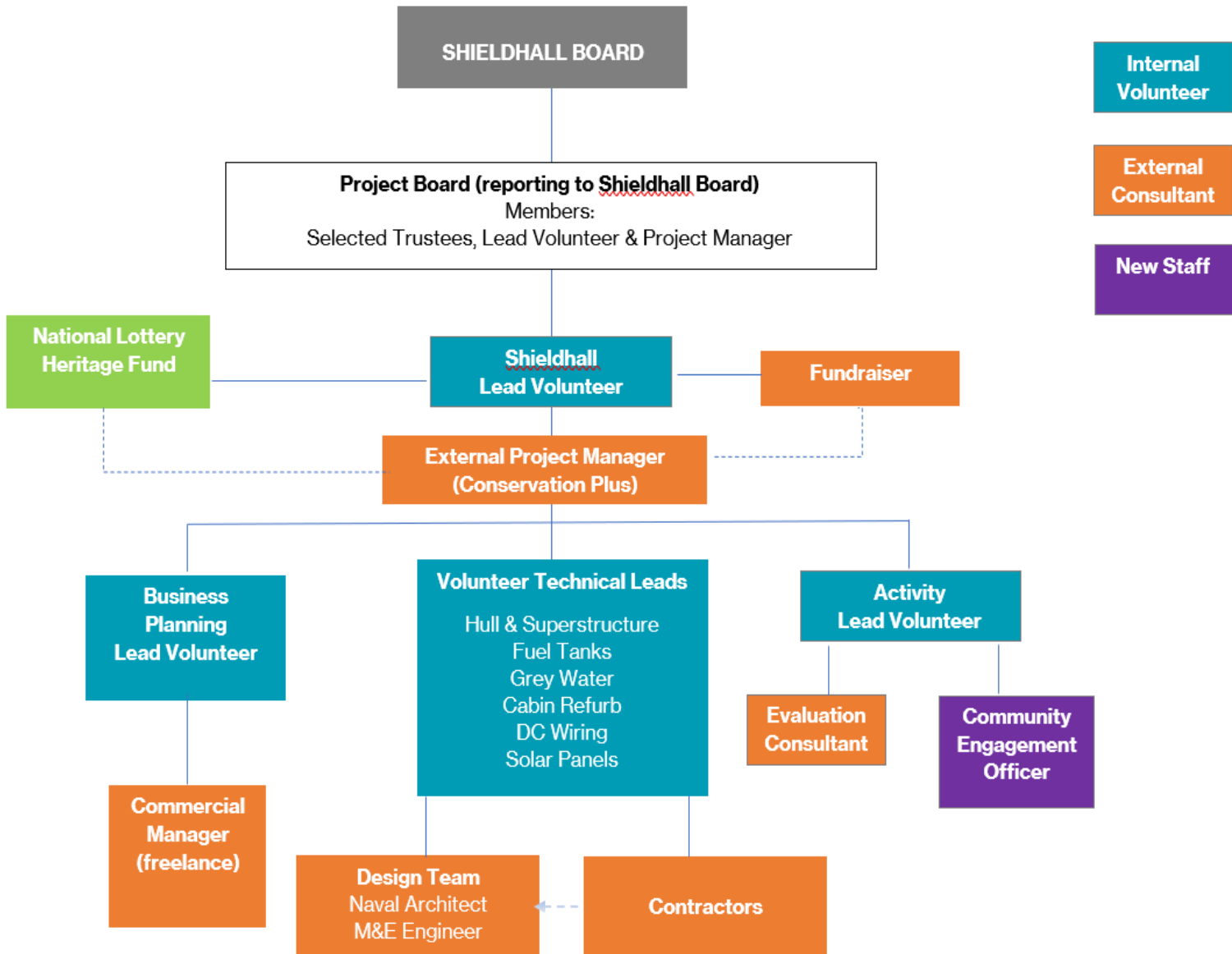
### Steamship Shieldhall: towards 2055, the next 10 years

| <b>Development Phase programme</b>          |                       |
|---------------------------------------------|-----------------------|
| <b>Task</b>                                 | <b>Date</b>           |
| Heritage Grant award confirmed              | December 2025         |
| NLHF Permission to Start process            | 27 Feb 2026           |
| <b>Ship Design RIBA 1-3</b>                 |                       |
| 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 (complete) |
| <b>Develop Activity Plan</b>                |                       |
| 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          |
| <b>Other activities</b>                     |                       |
| <b>Appoint Commercial Manager</b>           | <b>June 2026</b>      |
| Business: Understanding & strategy          | July 2026             |
| Develop new business offer/network          | July 2026 onwards     |
| Promote & grow business                     | Aug 2026 – Mar 2027   |
| Develop new Commercial Development Strategy | July – Nov 2026       |
| Draft Heritage Fund app form                | Jan 2027              |
| Delivery Phase cost plan                    | Dec 2026 – Jan 2027   |
| Update MMP                                  | Sep – Nov 2026        |
| <b>Fundraising</b>                          |                       |
| 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        |
| <b>NLHF Development Review</b>              | <b>December 2026</b>  |



| 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 |

## Appendix C: Delivery Phase organisational chart





## APPENDIX D: Form of Tender

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

**Project name:** **Steamship Shieldhall: towards 2055, the next 10 years**

**Professional Service:** freelance Commercial Manager

**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)

Confirm figure in words: \_\_\_\_\_ plus VAT (delete VAT if not applicable)

**Resources**

Please state the number of days intended for the delivery and development phase

**Day Rates**

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

| Team                   | Development phase |             | Delivery phase |             |
|------------------------|-------------------|-------------|----------------|-------------|
|                        | Day Rate £        | No. of days | Day Rate £     | No. of days |
| Freelance Lead         |                   |             |                |             |
| Other – please specify |                   |             |                |             |

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).

**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\_\_

|                                                                                                                         | <b>Tenderer to provide responses. Some are pass/ fail</b> |
|-------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|
| 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 (if applicable)         |                                                           |
| Please indicate your level of Public Indemnity Insurance, the policy number and expiry date (if applicable)             |                                                           |
| Please indicate your level of Professional Indemnity Insurance, the policy number and expiry date (if applicable)       |                                                           |
| Signature of authorised person                                                                                          |                                                           |
| Name of authorised person                                                                                               |                                                           |
| Capacity in which signed                                                                                                |                                                           |