

Resource: How to write an effective freelance brief

This resource was produced in partnership with Museum Freelance. It provides advice on writing a clear, realistic brief for a freelancer, and a guide on what to include.

What is a freelance brief?

A brief sets out what you're looking for from a freelancer or consultant:

- what support you need (the aims of the work, what activities and/or outcomes you're after, the timescales for delivery, the budget available);
- what you're looking for (particular expertise, skills, availability);
- how you will shortlist and select a freelancer (details of the tendering process timeline, any interviews, scoring criteria).

When do you need to create a freelance brief?

You should create a freelance brief when you need to commission a freelancer or consultant.

It helps freelancers to know what you're looking for and decide whether to apply, and it helps you to compare, shortlist and choose applicants based on their responses.

Even if you're only asking a select few candidates to apply, or are asking one freelancer to undertake the work, it is still advisable. The process of preparing a brief is useful as it encourages you to reflect and identify what support you need.

The brief can also be used as the basis for a contract between your organisation and the appointed freelancer.

A freelance brief should only be used for a freelance opportunity, not for positions that should be classified as employed, PAYE (Pay As You Earn) work. If you are unsure of the difference, you can use [this quiz from HMRC](#) to establish whether the work should be classified as self-employment or employment



- Top tips:**
- This resource is correct at time of writing, March 2021. Organisations are responsible for ensuring they comply with relevant and up-to-date guidance.
 - Find out more about freelancing and working with freelancers at [Museum Freelance](#).

The difference a clear brief makes

A clear brief:

- provides structure and makes the commissioning process simpler and quicker for both parties;
- is fairer, as it gives all freelancers the same information and starting point;
- means freelancers understand your requirements and apply based on being a fit with those requirements, minimising the likelihood that their time is wasted;
- saves you time as you are less likely to receive as many pre-application clarification questions or irrelevant applications;
- enables you to compare proposals on more of a like-for-like basis.

How to set a brief realistic for the budget

Ideally include a budget in your brief, or at least a budget range (from £x to £y) or a maximum budget. That way you will be able to compare proposals based on what freelancers can offer and provide for that budget. By knowing the budget, freelancers can understand and share the activities that are appropriate.

If you are unsure of what level of budget to allocate, seek advice. Consider asking your funder or [South West Museum Development](#) for input, or ask them to signpost you to other organisations that have run similar projects in the past. The museums community on Twitter and LinkedIn might also be able to help.

Another option is to pay a freelance consultant for a few hours' time to help you identify what support you need and how much that is likely to cost, to help to write a strong brief and/or help you with the shortlisting of applicants. This is especially helpful if there is limited expertise in your organisation about the type of work needed or if the budget and scope are sizeable. Make sure this is permissible within any procurement rules that you are bound by.

Day rates

As of February 2021, there is not one definitive guide on freelancers' rates and project rates, and some guides available online are inconsistent or are out of date. However, the Oral History Society has [a useful guide](#) to typical day rates and costs for different types of oral history work, and Museum Freelance is aiming to develop additional guides in other types of freelance work.

As [the Museum Freelance 2020 survey](#) shows, there is a huge range of day rates charged by freelancers, depending on the type of work carried out and a range of other factors such as experience, niche, supply and demand, availability, location etc. The majority of day rates for freelancers in the sector tend to lie between £200-400.

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Employed salaries cannot just be divided by the number of working days per year to get an equivalent freelance day rate. Freelancers also need to account for:

- costs incurred (e.g. insurance, equipment costs, professional memberships and services, travel, marketing, training and so on);
- tax and National Insurance;
- that they are not paid for days off or sick days;
- and that typically 20-40% of their time is not spent on fee-earning work (rather new business development, finance and accountancy, marketing, training, office admin, IT trouble-shooting etc.).



Therefore, lower day rates can end up equating to an actual hourly rate which is around (or even below) the Real Living Wage as set out by [the Living Wage Foundation](#) – despite some organisations mistakenly thinking they are healthy and fair. Low day rates also exacerbate the lack of diversity among freelancers in the sector.

What does a ‘good’ brief look like?

A good brief provides clarity for both parties, and gives you the greatest chance of having a wide, high quality pool of freelancers to choose from.

A ‘good’ brief includes:

- Clarity on what work is required – what deliverables and/or outcomes are needed;
- Sufficient detail to allow freelancers to understand the scope of the work, without being too prescriptive;
- Clear and adequate timescales both for the work and the tendering process;
- Realism in terms of what can be achieved within the budget, timescales and other constraints;
- A disclosed and appropriate budget;
- Transparency on shortlisting and appointment criteria;

An element of you ‘selling’ the work – freelancers should *want* to apply and win the work.

Key features of an effective brief:

Below is a suggested list of what to include in an effective brief, with some examples of what to include under each section.

At each stage consider how you can make the brief as fair, inclusive and transparent as possible, for example:

- **Fair:**
 - Ensure you are not expecting freelancers to provide something for free as part of their application, which you should in fact pay for;
 - Freelance briefs should have a clear closing date, which you adhere to;
- **Inclusive:**
 - Only ask for particular qualifications or professional memberships if a project requires it, and if so, give freelancers the opportunity to demonstrate equivalent experience instead;
 - Be open to case studies and references from employed positions, not just freelance work;
- **Transparent:**
 - Include the budget for the project, or at least a budget range or maximum in your brief;
 - Be clear on what you're looking for and your selection criteria.

Sections of a brief to consider:

Section	Recommended contents
Introduction	An introduction to the project and brief. You could include key information at-a-glance, for example what the work is, timescales and budget.
About the organisation	An overview of your organisation, with relevant context for the project.
Scope of work	<p>Set out what work you would like the freelancer to deliver. Include sufficient detail to allow freelancers to understand the scope of the work, without being too prescriptive.</p> <p>Specify any key objectives, and any key outputs or deliverables.</p> <p>Explain the purpose of the work, how you plan to use it and who the main audience for the work is.</p> <p style="text-align: right;">Cont.</p>

	<p>Cont.</p> <p>Explain what success will look like and how the project will be evaluated if applicable.</p> <p>Include any key milestones and deadlines.</p> <p>Explain who the freelancer would report to and whether they would be working with any other consultants or stakeholders.</p>
<p>Budget</p>	<p>Set out the budget available, or at least a maximum cap or indicative budget range so that applicants can provide an appropriate response.</p> <p>Be clear on whether the budget includes:</p> <ul style="list-style-type: none"> • the freelancer’s expenses such as travel • VAT or not (some freelancers will be VAT registered, although most in the sector are not). <p>Include the preferred payment schedule.</p>
<p>Contract duration</p>	<p>Set out your desired start date and completion date and any key milestones in between such planned events, presentations to board meetings, draft and final reports.</p>
<p>Legal requirements</p>	<p>Set out any legal or compliance requirements. For example:</p> <ul style="list-style-type: none"> • any procurement requirements you need to adhere to that are specified by your organisation or funder; • specifying that the freelancer will be responsible for their own income tax and National Insurance contributions (as this is a self-employed not employed role); • if the freelancer will access personal data, they need to be registered with the Information Commissioner’s Office.
<p>How to apply</p>	<p>Set out a clear timetable for the application process to include:</p> <ul style="list-style-type: none"> • A deadline for questions and clarifications (if applicable); • An application deadline; • A date by which you will notify shortlisted applicants (if applicable); • Dates for potential interviews; • A date by which you will get back to all applicants; • A start date.

<p>Instructions for responding to the brief</p>	<p>Specify any requirements such as:</p> <ul style="list-style-type: none"> • What applicants should include (e.g. a breakdown of the budget, their day rate, case studies of previous relevant work, referees); • How you want to receive responses, e.g. by email; • Limiting submissions to a maximum number of pages; • Limiting case studies and referees to recent years; • Asking for CVs. <p>Ensure your process and expectations of freelancers is appropriate to the value and scope of the work.</p>
<p>References</p>	<p>Set out whether you would like applicants to include the names and contact details of referees, and at which point you would contact them (before shortlisting or after interview).</p>
<p>Contract award criteria</p>	<p>Include what you are looking for and how you will evaluate submissions. It can be useful to provide a weighted breakdown so that freelancers understand your priorities, for example:</p> <ul style="list-style-type: none"> • To what extent is the proposal’s approach or methodology appropriate and shows an understanding of the brief, the organisation’s context and constraints? (40%) • To what extent is the proposal value for money? (30%) • To what extent does the applicant have relevant experience? (30%) <p>Consider accessibility and ensure that applications are open to a broad range of freelancers (see the resource on fair procurement for more information on this).</p> <p>Examples of questions you could include when evaluating tender submissions alongside your scoring systems are:</p> <ul style="list-style-type: none"> • Has the freelancer provided the information you requested in the brief? • Has the freelancer demonstrated an understanding of the project and your requirements? • Does the freelancer have the required experience / expertise to deliver the project? • To what extent is the methodology or approach suggested by the freelancer appropriate to the project? • To what extent does the proposal offer value for money? • Would the freelancer be able to work well with the organisation’s team?
<p>Contact details</p>	<p>Include who your named contact is for the process with an email address and phone number for questions. Have a second contact as a back-up.</p>

Definitions

This guide refers specifically to freelancers, but the advice provided is also relevant to commissioning and working with consultants, agencies and other suppliers of services.

The terms 'freelancer' and 'consultant' are often used interchangeably by those individuals and organisations that appoint them – both are independent, working with multiple organisations and self-employed, responsible for their own tax and National Insurance through the self-assessment process. However, a freelancer is generally paid for a specific deliverable (e.g. write interpretation copy, run a family workshop) whilst a consultant's role is to provide professional or expert advice (e.g. develop a fundraising strategy, advise on governance models).

Glossary

- **Brief:** a formal, written outline of the work you are commissioning.
- **Contract:** a legal document that states and explains the work agreed and terms and conditions for both parties.
- **Consultant:** an independent providing professional or expert advice.
- **Force majeure:** force majeure events are usually defined as acts, events or circumstances beyond the control of the parties, such as natural disasters. Force majeure clauses are contractual clauses which alter parties' obligations and/or liabilities under a contract when an extraordinary event occurs beyond their control.
- **Freelancer:** independent self-employed individual, generally paid for a specific deliverable.
- **HMRC:** Her Majesty's Revenue and Customs.
- **ICO:** Information Commissioner's Office.
- **PAYE:** Pay as You Earn, a system of paying income tax and national insurance contributions. An employer deducts tax and national insurance contributions from employee wages before payment.
- **Procurement Portal:** a tool that organisations use to bring their purchasing processes online. Freelancers and consultants can register on procurement portals to access information about briefs and tenders, or submit proposals.
- **Professional Indemnity Insurance:** a commercial policy designed to protect the self-employed if clients claim a service is inadequate. If disagreements occur, professional indemnity insurance covers the cost of putting things right and any legal fees arising.
- **Project creep (also known as 'scope creep'):** when the timeline of a piece of work extends beyond the agreed scope and/or the required deliverables increase, usually caused by client delays or changing requirements.
- **Proposal:** a response a freelancer or consultant puts together in response to a brief or tender.
- **Tender:** an invitation to bid for a project (also known as ITT, an 'invitation to tender').
- **UK GDPR:** UK General Data Protection Regulations.
- **VAT:** Value Added Tax.