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Tender Brief

The Speedwell Trust, a long-established charity, is seeking an experienced consultant to help implement specific strands of its Income Strategy to achieve greater financial sustainability. Over the past 33 years, the Trust has made a significant impact on the local community through various educational and nature-based programmes. We now face the challenge of ensuring our financial resilience and long-term sustainability through increased community engagement, corporate partnerships, and individual giving initiatives.

We have a unique opportunity to leverage our stunning natural environment, credibility, and existing relationships to create sustainable income streams through fundraising, events, and partnerships. However, as we have never actively sought support from the community or corporate sector before, we require a consultant with expertise in fundraising, communications, and engagement to drive these initiatives forward.

Invitation Document

To: Consultants

From: The Speedwell Trust Limited

Subject: Supply of Income Generation and Marketing Expertise

Date:02/10/24

1. Brief Background Note and Terms of Reference

The Speedwell Trust is a charity with over 33 years of history, dedicated to creating impactful eco-education, conservation, and wellbeing programmes in the local community. Situated in a beautiful natural setting, the Trust has built strong credibility in its work, but to date, has largely relied on grants and earned income to sustain operations. However, in order to secure its long-term future and continue delivering valuable services, the Trust now seeks to diversify its income streams by actively engaging with the local community, the corporate sector, and individuals through structured fundraising initiatives.

Funding from the Dormant Accounts will allow the Trust to seek external expertise to develop and implement strategies for Community Fundraising, Corporate Support, and Individual Giving. The successful consultant will drive these initiatives and help the Trust build greater financial sustainability through increased engagement with the wider community and key stakeholders. The Trust has a unique opportunity to capitalise on its natural assets, reputation, and the growing demand for nature-based wellbeing and eco-education programmes. To leverage these advantages, the Trust needs to develop a compelling case for support, raise public awareness, and foster strong fundraising relationships.

Terms of Reference (ToR)

1. Objective

The overall objective of this consultancy is to develop and implement fundraising strategies that will create greater financial sustainability for the Speedwell Trust by focusing on the following key areas:

- Community Fundraising
- Corporate Support
- Individual Giving

2. Scope of Work

The consultant will be responsible for delivering the following activities:

2.1 Income Generation

- Develop and implement a strategy to grow income from corporate partnerships, including identifying potential partners, creating partnership proposals, and securing corporate sponsorship or "charity of the year" agreements.
- Design and deliver community-based fundraising events and initiatives, engaging the local population to support the Trust's work.
- Launch and manage individual giving programmes, including regular giving, major donor initiatives, and legacy fundraising.

2.2 Communications and Engagement

- Develop a compelling **Case for Support** that clearly communicates the Trust's mission, impact, and financial needs to different audiences, including the community, corporates, and potential donors.
- Implement a **Communications Strategy** to raise awareness of the Trust's fundraising needs, using both traditional and digital marketing channels.
- Engage key stakeholders in the statutory, corporate, community, and voluntary sectors to build a network of fundraising supporters and partners.

2.3 Fundraising Event Development

- Develop and execute creative fundraising events that leverage the Trust's unique location and programme offerings (e.g., nature-based wellbeing events, eco-education workshops).
- Identify and engage volunteers to support fundraising efforts, ensuring the successful execution of events and initiatives.

2.4 Relationship Building

- Cultivate and build relationships with corporate partners, individual donors, and community groups.
- Develop a network of supporters and champions for the Trust's work, encouraging long-term financial support.

3. Duration

The consultancy is expected to be carried out over a period of **12 months**, beginning from the contract start date. This timeframe allows for strategy development, relationship building, event delivery, and evaluation of initial outcomes.

4. Reporting and Accountability

The consultant will report directly to the CEO of the Speedwell Trust. Regular updates will be provided to the Trust's leadership team, including:

- **Weekly updates** with the Trust manager on progress of each strand of the work.
- **Monthly progress reports** on key activities, income generation, and stakeholder engagement.
- Quarterly **milestone reviews** to assess progress against agreed targets and deliverables.
 - A **final report** at the end of the consultancy, including an evaluation of outcomes, lessons learned, and recommendations for future fundraising efforts.

5. Consultant Qualifications

The consultant should possess the following qualifications:

- Proven experience in **fundraising** across corporate, community, and individual giving channels.
- Demonstrated ability to develop and execute successful **income generation strategies**.
- Excellent **communication skills**, with experience in crafting compelling cases for support and engaging diverse audiences.
- Experience in **organising and delivering fundraising events**.
- Strong **relationship-building** skills, with the ability to develop networks and partnerships with corporates, community groups, and donors.
- Experience working with **volunteers** and building volunteer capacity for fundraising activities.
- Knowledge of **legacy giving** and developing long-term individual giving programmes is desirable.

6. Budget

The consultant should provide a detailed budget proposal, including:

- Consultancy fees.
- Associated costs (e.g., travel, materials).
- Any additional resources required to deliver the project effectively.

2. Required Services

We expect the appointed consultant to lead the development and implementation of key income-generating strategies, focusing on the following outcomes:

A. Income Generation

Develop and implement strategies to increase income from the following key areas:

- **Corporate Support:** Establish and cultivate corporate partnerships (e.g., company charity of the year programs, corporate sponsorships, and employee fundraising initiatives).
- **Community Fundraising:** Design and deliver community-based fundraising events and initiatives to engage the local population and foster community support for Speedwell Trust.
- **Individual Giving:** Develop and launch individual giving programmes, including regular giving, major donor programmes, and legacy giving initiatives.

Outcomes:

- Increase in unrestricted income through corporate partnerships, community fundraising, and individual donations.
- Development of a corporate partnership pipeline and secured partnerships.
- Engagement of local communities in fundraising events and activities that contribute to the Trust's financial sustainability.

B. Communications and Engagement

Develop and articulate a compelling **Case for Support** to explain why Speedwell Trust, after 33 years of impactful work, needs community and corporate financial support. The case should highlight:

- The importance of the Trust's work in eco-education, conservation, and community wellbeing.
- The unique value proposition of Speedwell's location and programmes.
- Why financial support from individuals, corporations, and the community is critical to ensure the sustainability of the charity.
- Develop and implement a **Communications Strategy** across traditional and digital channels to raise awareness of the Trust's work and fundraising needs. This should include:
 1. **Marketing campaigns** to promote fundraising initiatives.
 2. Engaging content for social media, newsletters, and local press.
 3. Building and nurturing relationships with potential supporters in the statutory, corporate, community, and voluntary sectors.

Outcomes:

- Increased awareness and understanding of Speedwell Trust's work and financial needs.
- Successful engagement of diverse audiences, including local residents, corporate partners, and individual donors.
- Increased participation in community fundraising events and corporate partnership opportunities.

C. Development of Fundraising Activities

Plan and execute a variety of **fundraising events** aimed at engaging different audiences, such as:

- Nature-based wellbeing events.
- Eco-education and conservation workshops.
- Craft programmes for families, businesses, and individuals.

Develop new volunteer roles that specifically support income generation activities and fundraising events.

Outcomes:

- Delivery of successful fundraising events that leverage Speedwell's assets, location, and expertise.

- Enhanced volunteer capacity, with volunteers specifically focused on supporting fundraising efforts.
- Measurable increase in community involvement and financial support through events and initiatives.

D. Relationship Building

Build and strengthen relationships with key stakeholders, including:

- Corporate partners, local businesses, and community groups.
- Potential major donors and individual supporters.
- Volunteers and ambassadors for the Trust.

Outcomes:

- Established network of corporate and community partners who actively support the Trust.
- Increased donor base for individual giving and legacy programmes.
- Enhanced volunteer engagement and capacity.

3. Timescale

- a. We would like the work to commence 01/11/24 with the expected completion date 31/10/25.

4. Requirements for submission

- a. E.g. submit one hard copy and one electronic document or no more than twelve A4 pages (exclusive of CV's) under the following headings (see also evaluation criteria)

Understanding of Brief

A summary of what the supplier understands is required and any insights into the requirements that can be gleaned from the supplier's own knowledge.

Expertise & Experience

This should include a composition of the organisation's experience delivering similar projects. It may include CVs, relevant qualifications, and any other relevant information.

Evidence of the following must be demonstrated clearly including a small portfolio:

EXAMPLE

- *Demonstrate that you have a good understanding of the project brief*
- *Demonstrate that you have previous experience of the work and the field/sector*
- *Demonstrate an ability to incorporate flair and creativity into design and development of website content*
- *Strong leadership and co-ordination skills and a track record in delivering similar website projects*

Methodology and Approach

This should include details of the number of days required to complete the assignment, over what period of time the assignment will be completed, assurance on how the successful company will plan for the delivery of the project.

Cost

Provide a breakdown of all costs in sterling. These costs should clearly indicate a rate per day and the number of days required to complete the assignment. Costs should be exclusive of VAT but inclusive of all anticipated expenses.

Interested suppliers should note that an overall maximum budget of £45000 has been allocated to this project and includes all costs associated with the creation and delivery of parts indicated within the scope of works.

5. The Speedwell Trust Limited Input

The Speedwell Trust Limited will provide some guidance on the service required, however it is envisaged that the successful company will take a pro-active approach in the delivery of the product. The successful company will be ultimately responsible for gaining permission/access/copyrights to any relevant images. The copyright of all text, images, intellectual property and other materials produced by the successful Contractor shall remain with The Speedwell Trust Limited.

6. Evaluation Criteria There will be a two-stage selection process:

Stage 1 - Selection Criteria

Criteria	Mark
<p>Company Experience</p> <p>The Tenderer shall supply at least two examples of similar contracts, carried out within the past two years which demonstrate:</p> <ul style="list-style-type: none">• Good understanding of the project brief• Previous experience of X, Y AND Z (as described under Expertise and Experience above)	Pass/Fail

Tenders that provide the relevant information requested will receive a pass mark and move on to stage two. Their submission will then be evaluated against the following criteria.

Stage 2 - Award Criteria

Criteria	Weighting
<p><i>Methodology</i></p> <p>E.g.</p> <p>Outline the approach and the methodologies you will employ to deliver this project (40%)</p> <p>Details of quality systems and controls that will be used in the delivery of the project, including proposals for keeping the Client updated. (20%)</p> <p>A resource schedule which includes a project timeframe, names of each project team member and any other relevant resources (20%)</p>	80%
<p><i>Cost / Value for Money</i></p>	20%
Total	100%

6. Payment schedule

Payment will be made at the end of each month on receipt of invoice.

7. Deadline for Submission

Quotations should be returned by 12:00pm on 12/10/2024 to:

- Stephen Crabbe
- stephen@speedwelltrust.com
- The Speedwell Trust Limited,
Parkanaur Forest
57A Parkanaur Road,
Dungannon
BT70 3AA

The successful supplier will be notified by 15/10/2024. A meeting will be convened shortly thereafter to provide further briefing and to agree a work plan.