
Brief for Fundraising Consultant/s

- *Based in own office, some visits to Newcastle and Manchester*
- *Required: May-July 2018*
- *Fee: up to £5250 including expenses and excluding VAT*
- *Application deadline: 12 noon on Monday 30th April*

Newcastle City Council and The National Trust wish to appoint a suitably qualified fundraising consultant or consultants to research and produce an endowment fundraising action plan for Newcastle Parks Trust.

1. Purpose of this brief

Newcastle City Council is setting up a new, independent charity – a Parks Trust – to look after the city's parks and allotments. The new charity will be tasked with maintaining the estate, fundraising, engaging the community and working with partners in the city in order to help the parks thrive and safeguard the public benefits the parks provide. The charity will be set up this year and the land will transfer to the Parks Trust in early 2019.

Ahead of this transfer, the National Trust is providing advice and support to the City Council and to the new charity. One area of support we are providing to the new charity is fundraising. In order to do this we now wish, with Newcastle City Council, to appoint a fundraising consultant or consultants to research and produce an action plan that will move towards an endowment fundraising plan and campaign for the new Newcastle Parks Trust.

The transformation of the portfolio of Newcastle City Parks into the Parks Trust involves changing the way the whole parks and greenspace portfolio is managed from a maintenance mind-set to value creation and long term sustainability. It will need to harness the full potential of the public asset, be centred on community participation with strong civic leadership and be funded by a diverse and blended mix of income sources. Key to that funding mix will be the set up and management of an endowment, potentially with seed funding of up to £3 million from Newcastle City Council (as part of its overall contribution), which will be the catalyst for further donations.

This is an exciting and dynamic venture which has taken years of planning and preparation. With the new Trustees and Chair of the Parks Trust about to be appointed this year, it is now critical that further specific research and a detailed action plan is commissioned, to focus on the funding of the endowment that will support the Parks Trust into the future.

As such, we require:

- In depth research across thematic, local, regional and national funding bodies and social investment agencies to identify which organisations could potentially be approached to support the creation of an endowment for the Parks Trust. This research would need to abide to the General Data Protection

Regulations (GDPR).

- A detailed action plan, including recommended approaches to funding bodies, and development of an implementation plan that can be presented to the new Board of the Parks Trust. Critical would be the application of GDPR to this action plan and advice to the new Board on the management of approaches under the new regulations.

The successful applicant will have extensive experience of endowment set up and social investment, as well as traditional grant/foundation/donor fundraising. A proven track record in fundraising and third sector financial business planning, with specific focus on endowment/revenue funding such as University or Hospital endowments is preferable.

The position is offered at a fixed fee of £5250, including expenses but excluding VAT. The project is funded by the National Trust. However the work will be managed jointly by National Trust and the new Parks Trust. The consultant's work must be completed by the end of July 2018, although implementation of the action plan will be from September onwards.

2. Background and need

Newcastle's parks and green spaces are a critical part of the city's green infrastructure and are key to the city's social, environmental, and economic prosperity. However, Newcastle City Council has seen its parks budget cut by 91% since 2010-11.

Supported by funding from the Heritage Lottery Fund (HLF), National Trust and the Council's own funding, Newcastle City Council has explored alternative funding and management solutions to secure and grow the public benefits which parks provide, such as enhanced physical and mental health, flood mitigation, improved air quality, workforce wellbeing, inward investment and a growing tourism and visitor economy.

Now, the Council has decided to establish a new, independent charity – a Parks Trust – to care for 33 of the city's parks and over 50 hectares of allotments.

The council is now working with National Trust and others to set up the new charity and help get it off to the best start possible. The advantage of a 'purpose built' charity is that it will be absolutely focused, from top to bottom, on the parks and green spaces of Newcastle and how they can deliver for its people. Combining this mission with financial responsibility means it will be incentivised to generate funds, but never in a way which erodes its charitable purpose. Being part of an independent charity will also encourage individuals to deliver with a creativity and flair that is often difficult as part of a large organisation.

It will also open up new funding and investment opportunities. But key to the success of the new Parks Trust for Newcastle's parks and green spaces will be the setup of an endowment managed by the Parks Trust purely for the support of the Parks. An endowment could be built up to provide core funding for the Parks Trust, ensuring it thrives, not just survives.

The benefits of an endowment are:

- It enables the nascent organisation to be focused on its core purpose of conservation and public access and these activities to be at the heart of what it does.
- It guards against the new organisation becoming funding led rather than strategy led.
- It enables organisations that benefit from parks to pay towards their future and have a stake in their management. This will help to deliver more public goods, for example, water management, flood mitigation and health, inward investment and wellbeing benefits
- It enables a relentless focus on the provision of public benefits through public parks.
- It provides a steady source of income based on the return on investment. This will help a Parks Trust to ride out fluctuations in other forms of income, for example, poor commercial returns.
- It replaces the local authority subsidy by converting a one-off payment into a revenue stream.

This is the path Newcastle have chosen to follow and the focus of this piece of work is to research, identify

and put in place an action plan to build the endowment fund.

It is estimated that £15 million will build a healthy and robust endowment for investment. Newcastle City Council could potentially seed fund up to £3 million from Newcastle City Council (as part of its overall contribution). The next steps are to identify and secure the remainder.

3. The brief

Working closely with the National Trust Future Parks Project Manager and specific contacts at Newcastle City Council, the consultant will research and develop a detailed action plan of funding opportunities that would form the basis of an approach strategy for the endowment fund. With the new GDPR procedures now coming into place, it would be critical that the information was presented and researched in accordance with these procedures.

While the primary goal is to research credible opportunities for funding an endowment and present a clear action plan, we would be looking not only for traditional sources of funding but also social impact investment and new methods of fundraising such as crowdfunding, social bonds etc. Therefore knowledge of new and emerging ways of giving, linked to community benefit, is a key attribute we will be looking for.

The consultant will take the principal role in carrying out two main tasks:

1. Researching the possible avenues for funding the Parks Trust endowment
2. Writing an action plan of how to make those approaches

It is envisaged that the action plan will then be presented to the Chair and Trustees of the new Parks Trust at their first board meeting, to look at the short and long term options for approaches. We acknowledge that the funding strategy for the endowment will be long-term and implemented over a number of years. As part of your research we would like you to suggest some timeframes for the fundraising and outline the resources needed to do this (staffing, budgets etc).

In the research phase (May to June) the consultant will:

- Carry out a review of the organisations that have already been identified or have shown an interest in giving to the Parks Trust endowment – working closely with the National Trust Project Manager and Newcastle City Council
- Use existing data to look at opportunities for funding and social investment from place based and national funders – this might include grants, private trusts and foundations as well as businesses.
- Carry out research across traditional fundraising streams such as grant making bodies, Trusts and Foundations into what schemes are available to fund endowments at an international, national and regional level (N.B. the Parks Trust model is well established in the USA and other European and non-European countries; some funders from outside the UK may want to give to the Newcastle Parks Trust endowment).
- Identify new opportunities including social investment, grants, philanthropic giving and Government schemes that would be suitable – based around thematic themes such as health and wellbeing, leisure and sport, nature conservation.
- Research the corporate social responsibility policies or corporate giving policies of local, regional, national and international businesses that might be interested in contributing to the endowment, mapping out why this is the case and how an approach might be made. Where these are set several years in advance, please indicate the timescales of when refreshes are due.
- Identify relevant public policy levers that might form the basis of an approach to central government.
- Identify tax relief and other incentives that might encourage businesses to give, via philanthropic giving or social investment.
- Present the outcomes of the research to the new Board of Trustees.

In the action plan phase (June to July), the consultant will:

- Work up from the research phase, a clear approach overview and plan for the identified funders both in

the short and long term, with clear application of the GDPR as paramount.

- Devise an action plan for implementation and draw up a timetable for proposed approaches.
- Identify the key milestones to be achieved for each approach plan.
- Suggest a budget that may be required for effective implementation.
- Carry out a briefing session for those Trustees and other key internal contacts who will be involved in helping securing the funding, to ensure that they understand the role they will play as advocates for the Parks Trust and the endowment.
- Make recommendations for next steps in the implementation of that action plan for the funding of the endowment.
- Help make recommendation for the setup of a wider fundraising strategy for the wider Parks Trust and next steps.
- Help develop propositions for potential approaches to interested parties.
- Help plan and deliver a ‘roundtable’ event for around 10-15 key advocates in Newcastle, from large civic institutions and corporates headquartered or with a business interest in Newcastle.

4. Person specification

The successful applicant will have:

- Significant experience (five to ten years) in raising funds for large organisations.
- Knowledge and experience of non-traditional fundraising methods, including social impact investment, crowd funding and other new and emerging methods of fundraising.
- Knowledge and experience of taking a ‘development’ style approach to fundraising.
- Up to date knowledge of the General Data Protection Regulation (GDPR) and application of the regulations to the brief.
- Knowledge of the North East funding climate.
- Experience of developing £million plus fundraising action plans and a successful record of gaining the funds, including from non-traditional funding sources.
- An understanding and demonstrable experience of creating approach research and action plans.
- An understanding of green space and heritage as well as social impact.
- Good presentation and communication skills.
- Ability to work at many levels – office or shop floor to boardroom.

5. Anticipated timescales

Action	Date
Invitation to Tender issued	w/c 9 April 2018
Deadline for bids (12:00 PM)	30 April 2018
Provisional date for interviews	w/c 7 or 14 May 2018
Contract award	May 2018
Project inception meeting and contract start date	May 2018
Research phase ends	June 2018
Action plan phase ends	end July 2018

6. Budget

The guide price for this work package is £5250 inclusive of expenses but excluding VAT.

7. Proposal

7.1 Tender requirements

The National Trust and Newcastle City Council would like to invite suitably qualified consultants to submit proposals to deliver the above brief.

Please include with your proposal:

1. A statement of how you will approach fulfilling the brief with a clear statement of the way you would ensure that GDPR would be adhered to.
2. A statement of what you will provide, in terms of your time and other resources, within the fixed fee of £5250.
3. A full CV which explicitly addresses all the points listed in the Person Specification
4. A statement of why this commission should be given to you, and what special knowledge and skills you will bring to it.
5. Suggested terms of payment and insurance requirements

Tenders must be submitted by email, as Word or PDF attachments not exceeding 5MB, to victoria.bradford-keegan@nationaltrust.org.uk not later than 12 noon on Monday 30th April.

Tenders will be scored on the basis of your response to 1-4, equally weighted (25% each).

Successful candidates will be notified by Wednesday 2nd May and will be asked to attend a formal interview at the National Trust offices in Manchester or Newcastle w/c 7th May or w/c 14th May.

8. Further information

For queries or an informal chat about the commission, please contact Victoria Bradford-Keegan, on 0161 234 9973 or 07887993383, or email victoria.bradford-keegan@nationaltrust.org.uk.

Background papers will be made available to all applicants who wish to apply.