



student action on world poverty and the environment

People & Planet fundraising consultant specification

Date of issue: 4 December 2019

Overview

People & Planet are seeking to engage one or more consultants to advise us on how we can best allocate resources to increase our unrestricted income. This document is a call for quotations on phase 1 of this project – a review of our current activities to generate unrestricted income and development of a funding strategy for the future. We have a maximum budget of £13,500 for this phase, and expect it to be concluded by the end of April 2020.

About People & Planet

People & Planet is the UK's leading student network campaigning for global social, environmental and economic justice. We were founded in 1969 as Third World First. The organisation has been through several iterations of how we work – from being a fundraiser to implementing development projects. In our current form, which has been in place for at least 20 years, we support a network of university campus-based campaigning groups.

The network is supported by a staff team (currently nine people) who are based in Oxford.

People & Planet is a registered charity (England & Wales: 1140864; OSCR: SC043394) and a registered company (06417846).

More information about People & Planet's history and activities can be found on our website at <https://peopleandplanet.org>.

Overview of People & Planet's income streams

People & Planet are reliant on day to day fundraising to finance our activities. We do not have, and are unlikely to have, investment or endowment income. Over recent years we have had a relatively stable income of between £310k to £350k per year. Our sources of income over this period are also relatively stable. Restricted grants (from trusts & foundations, NGO's and government) form 80%. Unrestricted donations are 15%.

We are seeking to increase our overall income to meet unmet demands on our services, and especially to increase unrestricted funding to given us more flexibility to fund activities that are less popular and/or harder to fund with restricted grants.

A summary of our recent income from individuals (the bulk of our unrestricted income) is provided in annex 1 of this document.

Overview of the planned work

People & Planet is about to embark on a three year project in which we will seek to increase unrestricted income. There are several components to this project, that are split into two phases.

Phase 1

- Migration of existing supporter data to a new database.
- Review and analysis of People & Planet's unrestricted income generation.
- Development of a new fundraising strategy for future unrestricted income generation to include what sources and initiatives to continue, what to drop, and what to develop.

Phase 2

- Development of the selected initiatives, together with the processes and IT requirements to support this.
- Evaluation of the whole project.

At present, People & Planet are seeking to employ one or more consultants to deliver the fundraising elements of phase 1 of the project (i.e. fundraising review and development of a new strategy).

An IT consultant has already been recruited to develop a new supporter database.

Deadline for quotations

Quotations must be received by 10am on 6 January 2020.

Detailed specification of works to be completed

The following specification represents the minimum requirements. We are open to additional elements being added to a quotation as long as they are justified and the total funding available for the work is not exceeded.

People & Planet's expectation is that all work will be completed within six months of agreeing a contract to deliver the specified work.

Review of People & Planet's unrestricted income generation

People & Planet is seeking a comprehensive review and analyse of how we generate unrestricted, including a historical context to this. We expect that quantitative and qualitative methods will be used, and that a range of stakeholders will be involved including:

- Current and lapsed donors.
- Supporters that do not currently give.
- Current and recent People & Planet staff and volunteers.

The review should, as a minimum, provide answers to the following questions:

- What motivates people to give to People & Planet? What de-motivates them?
- How do our fundraising activities and outcomes compared to other similar organisations?

Outputs from the review

As an output from the review we expect a written report, and a presentation and discussion of the findings of the review at a People & Planet Management Team meeting. This meeting will be face to face, held in Oxford, and last for up to two hours.

We are open to the exact format of the report, however these general guidelines might help you in terms of allocating time and resources to the report.

- It needs to be bespoke to People & Planet – based on research and our specific opportunities and barriers to fundraising. We're not interested in an off the shelf report!

- The main focus of the report should be a synthesis and analysis of findings.
- The methodology should only be briefly summarised. We're more interested in what you found out than how you did it.
- Please write the report in plain English. Don't assume we know (or will be impressed by) lots of jargon or acronyms.
- We would like an executive summary of around 500 words that works as a stand alone document.
- The whole report should be a maximum 5,000 words.
- We welcome tables and graphics in the report and executive summary.
- The report will be an internal document to People & Planet, so please don't spend time/money on making it look great or on brand.
- It may be useful for you to allow time to incorporate feedback on drafts of the report in accordance with the above.

Development of fundraising strategy

Based on the fundraising review, we expect you to produce a comprehensive strategy of where People & Planet can best allocate our resources to maximise unrestricted income. The strategy should be sensitive to the particular opportunities and constraints that face People & Planet. We would expect this to include a detailed cost versus benefit analysis across a range of income stream opportunities, and recommendations for which income streams in which People & Planet should invest.

The criteria for an output on this are similar to those of the fundraising review outlined above.

Monitoring & evaluation

The successful provider of works will be required to submit monthly written update reports and copies of work completed to date. They should also be prepared to have a monthly update meeting (this can be online) with the project manager. The costs of this should be factored in to the budget submitted as part of your quotation.

Budget available

The total funding available for this work is a maximum of £13,500 inclusive of VAT (People & Planet are not able to reclaim VAT). Value for money will be a key criteria for selection.

We expect payment terms to be monthly based on actual work completed to the agreed standard.

Skills and expertises required

The work described in this specification requires a broad range of specialist skills. We expect the successful contractor to be able to demonstrate that they have all of those skills and expertise in place. We are open as to the delivery model of completing the work – from an individual who has all of the skills and expertises required to a team of people with specific skills that add up to all those required.

As an example of the types of skills and expertises, you may like to consider how you would draw on expertise on the following fundraising techniques:

- Recruitment and retention of regular givers.
- Fundraising drives (e.g. Christmas appeals).
- Organised events (e.g. festival stewarding)

- Decentralised events and community fundraising (e.g. people organising their own fundraising activities).
- Recruitment and retention of major donors.
- Legacy fundraising.
- Affiliate fundraising and merchandising.

If there is a team of people involved, we want to know what the management arrangements are within the team. We also require that there be one project manager who takes overall responsibility for the project and for engaging with People & Planet. Please include these details in your quotation.

What to include with your quotation

- Detailed quotation. In no more than 2,500 words (five pages not including tables and graphics), please tell us how you'll help us make a step change in our unrestricted income.
- Monthly activity plan. This should include who will do each activity and the cost of that activity.
- A monthly phased budget, which should be inclusive of VAT and clearly indicate day rates for each person involved in delivering the work. The budget should be submitted as a spreadsheet file.
- CVs for all persons involved in delivering the work. This should be a maximum of two pages and include two referees who will vouch for the person have satisfactorily completed similar work in the recent past (and who have agreed to be contacted by People & Planet for ensuring this purpose).
- [Optional] You may include a brief case study on similar work that you have done for another client. If you do, we would appreciate a case study that succinctly sets out the aims and objectives, what you did, and what the results were. No more than two pages please.

All information submitted will be treated as commercial in confidence and/or as personal data as relevant and treated accordingly.

Quotations should be emailed to: fundraising@peopleandplanet.org

Further information and questions

We welcome any questions you have about this request for quotations. The earlier the better!

For further information or any questions regarding this project, please contact Graham Gillions, Co-Director: Development.

E: fundraising@peopleandplanet.org

T: (01865) 403 225

People & Planet Student Activities Limited.

Company number 06417846

Charity Commission 1140864

OSCR SC043394

Registered address: The Old Music Hall, 106-108 Cowley Road, Oxford, OX4 1JE