

The   
Community  
Foundation  
Northern Ireland

**Terms of Reference to appoint a Fund Development Consultant for up to  
twelve months**

**November 2020**

## 1. Background to the Community Foundation for Northern Ireland

### 1.1. Vision

**The Community Foundation for Northern Ireland connects people who care to causes that matter.**

For over 40 years the Community Foundation has been a trusted, secure means through which donors choose how, when and where they give, by helping them to set up funds, supporting them to make grants and to see the impact of their donations on local communities in greatest need.

We believe that a vibrant Community Foundation is a vital part of helping Northern Ireland move forward as an institution independent of the government and beyond party politics, built on voluntary contributions from the community and caring about the most marginalised and vulnerable in society.

The role of the Community Foundation is to develop a culture of giving from local people and those with a local connection.

We bring donors and local communities together, supporting people to direct their giving to issues and causes that are important to them and to where it is really needed.

### 1.2. Strategic areas

We outwork our vision in two ways

- **Achieving Impact** - making grants, donations and encouraging programmes to support local communities, particularly to help the most marginalised and vulnerable. Building sustainable communities and giving communities a voice underpin all our work.
- **Inspiring Generosity** - effectively helping donors direct their support to causes that matter in NI. We work in partnership with philanthropists and funders advising on impact and managing the delivery and distribution of charitable funds and programmes on their behalf.

### **1.3. Values**

While pursuing our passion for giving and for social justice, we hold each other to account to act with the following values:

#### **Generosity:**

We encourage generosity in everything we do; we look out for each other; we deal with everyone with compassion, empathy and understanding. We are flexible in how we work with staff, donors and grantees.

#### **Thriving:**

We see the potential within both our staff and the communities we work in and are committed to help both reach their full potential.

#### **Together:**

We will only make the change we want to see together. We value participation, working with others and bringing people together.

## **2. The Project**

### **2.1 Context**

We have ambitious plans to grow and develop our programmes over the next three years. This will require securing additional investment, working in partnership with other funders and co-creating programmes which meet strategic priorities.

### **2.2 Purpose**

We wish to contract a fund development consultant for up to 60 days over twelve months to support this process.

### **2.3 Key aspects of the contract**

- Secure and grow revenue income for strategic programmes
- Develop cases for support

- Research and map funding/funder priorities
- Develop and write bids, proposals and reports
- Cultivate and develop relationships with key partners internally and externally
- Support and provide excellent stewardship and donor care in line with the Foundation's policies

## **2.4 Monitoring and Reporting**

The consultant will work closely with the leadership team and report to the Community Foundation's Director of Philanthropy. All work will be recorded on the Foundation's CRM on-line database which can be accessed remotely. Reporting regularly she/he may also be required to engage in and contribute to operational and strategic planning.

Targets and KPI's will be agreed at the outset and progress on these will be monitored. A quarterly review of performance will take place which will determine whether or how the contract should continue for the next quarter.

## **3.0 Timescale**

### **3.1 Delivery Timetable**

The contract will start in January 2020 and will be for up to 12 months, subject to satisfactory quarterly reviews. We expect to award a contract for up to 60 days, heavily weighted in the first quarter.

## **4.0 Selection Criteria**

Proposals will be selected for their ability to demonstrate appropriate knowledge, skills and capability to deliver a sustained approach that offers value for money to the Community Foundation. They should highlight the consultant's suitability to fulfil the brief using examples of previous work carried out in the same area.

### **4.1 Scoring and Assessment Criteria**

#### **4.1.1 Pass/Fail Criteria**

- The ability to deliver outputs in the timeframe outlined
- That the consultant will be contracted on a self-employed basis

#### 4.1.2 Criteria

Criteria	Score
Understanding of the project, the operating context for Trusts and Foundations and the ethos of the Community Foundation for Northern Ireland	10%
Skills, knowledge and capability to deliver on this project, using examples of previous similar projects managed and success in cultivating, and managing partnerships and securing funds. These should include financial information of previous funds raised.	30%
Approach and Delivery - this should detail the approach to carrying out and delivering the project	50%
Value for money	10%

#### 5. Tender Information

Tenders should include the following information, under each of the separate headings numbered 1 to 6:-

1. Confirmation of meeting the pass/fail criteria.
2. Understanding of the project, the operating context for Trusts and Foundations and the ethos of the Community Foundation for Northern Ireland
3. Skills, knowledge and capability to deliver on this project, using examples of previous similar projects managed and success in cultivating,

and managing partnerships and securing funds. These should include financial information of previous funds raised.

4. Details of two referees who can provide information on the consultant's work in similar projects.

5. Approach and Delivery - this should detail the approach to carrying out and delivering the project.

6. Total Cost - the total cost, a breakdown of the number of days that will be allocated to the project, plus the daily rate (including VAT) should be set out clearly.

## **6. Tender Submission and Appointment Process**

Please ensure that you provide information on each area requested in a clear and concise manner to ensure that this can be reviewed and scored in line with the scoring matrix shown above in Section 4.1.2. Please use the following headings in your proposal:-

1. Pass/Fail criteria
2. Understanding of the Project and the Brief
3. Skills, Knowledge and Capability
4. Referees
5. Approach and Delivery
6. Costs

An electronic copy of your tender proposal should be submitted by **12 noon on Wednesday 16 December 2020** [nbell@communityfoundationni.org](mailto:nbell@communityfoundationni.org). Tenders received after the closing date will not be considered.

A panel will score submitted tenders and shortlist consultants for interview. Scoring will relate to the requirements outlined in this tender specification and as detailed in Section 4.1.2.

The successful consultant will be contacted in writing at the end of the process. It is hoped to complete this process by 8 January 2021. The panel reserves the right not to accept the lowest or any tender.

## **7. Further Information**

Contact: Siofra Healy, Director of Philanthropy

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