



An Options Appraisal for Piloting a JRCT Movement Building Fund

Invitation to tender

Background

The Joseph Rowntree Charitable Trust (JRCT) has a long history of supporting work to tackle the root causes of conflict and injustice. The Trust has traditionally emphasised work aimed at influencing policy and legislation, believing it to be the most effective route to structural change. The Trust has supported a limited amount of grassroots organising or direct movement building.

A shifting political context has seen setbacks across much of Europe for progressive causes. Against this backdrop, the Trust decided to learn about social movements. In particular, the Trust was interested to learn whether movements and movement building might offer something distinct to our model of affecting social change.

Our conclusion was that social movements are an important and largely missing element within our funding of social change. The Trust recognises that policy and legislative advocacy on its own is not enough to achieve the transformation that JRCT strives for, and that movements are often critical in shifting the public debate.

A social movement approach fits with our interest in tackling the root causes of conflict and injustice and offers a vehicle to shift power relations in society. It also connects with our ambition to broaden our geographical reach. The Trust has begun to embed learning about movements within each of its grant programmes and now wishes to pilot a support fund for movements.

Purpose

The purpose of this consultancy project is to develop and appraise a set of options for a pilot JRCT fund to test and evaluate an approach to support the work of movements in the UK.

Staff within JRCT have done some initial thinking based on our previous learning initiative. The pilot fund will connect with our core focus on tackling conflict and injustice and our five thematic grant programmes. It is envisaged that the pilot fund will have at least two core aims; to build the capacity and long-term infrastructure of movements, including increasing reach and engagement; and to facilitate connections, collaboration, and movement-wide planning to harness the power of a range of approaches.

The consultancy project will help us to consider the following questions:

- What is our theory of change for supporting movements?
- What options should JRCT consider to pilot support for movements that are rooted in what movements need and fit with charitable purposes?
- What are the pros and cons of these different options?
- How do we take forward one or more of these options?
- How will we learn from these pilots and how will we evaluate them?
- What possible future phases of development could we consider?
- How do we embed the initiative in the work of committees and the Trust as a whole?

The audience for this work is the JRCT staff and trustees. JRCT has a steering group of trustees and staff to oversee the project.

Methodology

It is anticipated that the key tasks are as follows:

- To clarify the assumptions behind JRCT's movements initiative: the challenges and opportunities it is addressing and the types of work it wishes to support.
- To reference the wider context of movement building activity, including the work of trusts and foundations, to help contextualise what JRCT can add to the picture.
- To appraise the current engagement of a sample of JRCT grantees with wider social movements.
- To consult senior staff, trustees, committees and field actors (movements, activists, movement support groups, funders) to surface a range of options for a possible pilot fund.
- To establish and apply a framework for appraising these options (see below).
- To identify some possible first steps on a smaller set of these options.
- To produce an evaluation framework to assess progress and learning.
- To present these options to senior staff and then to the full Trust.

A framework for appraising options should include the following factors: fit with goals, charitability, risk, budgetary implications, capacity/staffing implications, power and privilege, participatory approaches, implications for the grant application process, potential for impact in relation to our grant programmes, potential for learning, and potential for development/growth. The Trust is keen to receive a set of options that are workable within existing charitable purposes.

The following process is proposed for implementing the project with the successful applicant:

- i. The selected consultant will be consulted on the terms of reference, to ensure the framework is realistic and robust. On the basis of this

discussion, the consultant will refine their methodological approach to the project.

- ii. An inception meeting.
- iii. The consultant will undertake the project.
- iv. The consultant will submit a draft of a final report by 7 August 2020
- v. The consultant will submit a final report by 26 August 2020. The report should be a maximum of 20 pages in length, including an executive summary, plus appendices.
- vi. The consultant will present the report in person to the JRCT board of trustees, at the September meeting.

The consultant will work closely with Trust staff throughout the project. It envisaged that a steering group of staff and trustees will meet bi-monthly to receive an update on the project.

Timeframe:

- Submission of responses: by 12 noon, 24 January 2020
- Interviews: 12 February 2020 (London)
- Appointment: 24 February 2020
- Draft report: 7 August 2020
- Final report: 26 August 2020
- Presentation of report: 11-12 September 2020 (York)

Criteria for assessment

Proposals will be assessed against the criteria specified below, along with value for money.

The selected consultant(s) will have:

- Experience of working with grant-making trusts and foundations, particularly in terms of researching and advising on the development of new funding initiatives.
- Knowledge, experience and skills in evaluation and theories of change.
- Familiarity with the roles and practices of social movements, and preferably first-hand experience within movements. In particular, familiarity with grassroots organising and community development, building allies and mobilisation.
- Knowledge and experience of key issues within philanthropy, including participatory grantmaking, power and privilege, charitability.
- Knowledge and skills in qualitative research approaches, including the design of research tools, conducting interviews, facilitation of focus groups, data collection, analysis and reporting.
- Feasibility and rigour of methods for delivering the work.
- Strong communication skills, including listening and questioning, the ability to build trust and rapport quickly, able to communicate information well, both verbally and in writing.
- Sympathy with the Quaker values and ethos of JRCT.

This is a lengthy list of skills and experience. If you don't meet all the criteria but are interested in the work, we would still like to hear from you. Please see contact details below.

Budget

Please provide an overall price, daily rate and number of days required to complete the evaluation. This figure should include expenses related to travel and subsistence for research purposes.

Liaison

The consultant's primary point of contact and support will be Michael Pitchford, Assistant Trust Secretary at JRCT, which is the contracting organisation.

To apply

Please submit the following by **12 noon, 24 January 2020**:

- Names, roles and CVs of consultants/team members to be involved in delivery.
- Details of your proposed approach and activities you would undertake.
- An outline of your skills, suitability and experience to deliver the project, considering the assessment criteria above.
- Your understanding of the opportunities and risks associated with this project and how you would maximise or mitigate them.
- Budget outline, including daily rate and number of days.
- Contact details of two referees.
- An example of your written work as a hyperlink.

The maximum length of proposals, including short CVs, should not exceed ten A4 pages.

We are open to proposals from consortia of organisations or individual consultants, where there are clear roles set out.

Michael Pitchford is available to answer queries – email details below or tel: 01904 627 810.

Please return your submission to JRCT by email to michael.pitchford@jrct.org.uk. Please include the subject line *JRCT Options Appraisal for a Movement Building Fund: Tender Response*.