

ABINGDON TOWN COUNCIL

Report to	Finance, Governance and Asset Management Committee
Meeting date	9 January 2024
Report author	Cllr Penny Clover, Ron Spurs, Locum Clerk
Agenda item	12

APPOINTMENT OF FUNDRAISING CONSULTANT BY ABINGDON TOWN COUNCIL

1. **Purpose of the Report**
 - 1.1 The FGAM Committee is asked to consider this report and Approve/Not Approve the appointment of a Fundraising Consultant.
 - 1.2 To Approve/Not Approve the allocation of £6,000 to the Budget code 111/44/05 in relation to the commissioning of a Fundraising Consultant.
2. **Summary**
 - 2.1 Abingdon Town Council (ATC) is aware that grants from various sources including central government or other councils working alongside ATC, become available from time to time for which the Council is eligible to apply. The Council is looking to appoint a fundraising consultant with experience in obtaining this form of grant.
3. **Action required**
 - 3.1 The Committee is asked to Approve the appointment of Orchard Fundraising to undertake the project outlined above at para 5 of this report. This will enable the Council to make use of opportunities for major projects to obtain external funds as appropriate or in partnership with the District or County Council or in partnership with other parties as appropriate to the project.
4. **Link to strategic plan and objectives**
 - 4.1 To develop a resilient, sustainable town which will provide a home for residents now and in the future.

5. **Background**

5.1 On 23rd October the Locum Town Clerk contacted six local Fundraising Consultants asking the companies to submit expressions of interest to fulfil the brief shown below:

“The Council is looking to appoint a fundraising consultant with experience in this form of grant procedure. The brief is to:

1. Review potential funding sources and identify grants where the Council may gain funds for their projects. A background of projects where additional funding would be welcome will be provided upon appointment.
2. Report regularly (and if appropriate due to short deadlines) directly to the Town Clerk and Chairman, to the appropriate Council committee on grants with the details and deadlines.
3. A monthly retainer for this work will be payable upon appointment– estimates to be provided on the basis on one half day per month.
4. Although it is recognised that each application will require different work, to give an estimate for an application taking 5 days for comparative purposes.
5. Upon agreement of terms and conditions for making an application for a specific project, undertake additional work for making an application to meet the deadlines under supervision of the Town Clerk.
6. Prepare a quotation for undertaking the application process under the direction of the Town Clerk and the working party or councillors involved with the project.”

5.2 **Specific Brief and Quotes**

The brief asked for details of experience and for comparison purposes the cost for a retainer per month and an estimate for the cost of working for 5 days on a specific brief for application to a grant source to meet the needs of the Council projects.

The table gives an outline of comparative costs supplied by the consultants who responded:

Name of company	Rate for 0.5 day /month	
	Retainer	example 5 day project cost
Orchard Fundraising	No fee	£2,000 + VAT
James Baddeley	£300	£2,500 + VAT
Caroline Taylor consulting	£350/day	£1,750

5.3 Recommendation

Orchard Fundraising are appointed as Fundraising Consultants for Abingdon Town Council.

6. Key information and options

- 6.1 See attached Minute F30/23 from the meeting FGAM 27 July and Minute F50/23 Funding Opportunities:

F30/23 Grant proposal

The committee considered a proposal from Cllr Penny Clover for a funding opportunity for planned building refurbishment work. Cllr Clover was thanked for bringing this to the committee.

The committee noted that it may be beneficial to appoint a consultant to prepare the bid and the Town Clerk was asked to explore this in consultation with the Chair of the committee.

It was **proposed** by Cllr Halliday, **seconded** by Cllr Forder and **AGREED** that the Town Clerk, in consultation with the Chair of the committee, would appoint a consultant to prepare funding applications to the community ownership fund; that if a consultant was to be appointed on a success fee basis, the town council would seek references and undertake due diligence prior to making an appointment; and that Cllr Clover would be consulted on possible consultants.

- 6.2 Orchard Fundraising

www.orchardfundraising.co.uk

Following a one hour ZOOM discussion with the Principal, Samantha Watson, this organisation then provided a detailed summary of how they would approach and work with the Town Council. They have direct experience from working with Tewkesbury Town Council. This was for a Grade 2* listed building and Museum requiring serious maintenance works. Orchard staff worked with that Council on a community engagement exercise and needs analysis so that support from residents was demonstrated. A fundraising strategy was developed and steering group involved. A key partner was Historic England which provided guidance and assisted in securing funds, matching some already designated by the town council so that Phase One (£500k) has been secured. Orchard continues to work for the Town Council on Phase 2 developments and were part of the project team.

- 6.3 Orchard Fundraising stated that a monthly retainer on appointment is not required; if no work is carried out no payment is payable. Rates per day are £400 plus VAT.

7. **Climate change/green implications**

7.1 None

8. **Financial/budget implications**

8.1 Budget Code 111/4405.

9. **HR implications**

9.1 Overall Management of the Contract will be by the Town Clerk.