

## **TENDER FOR TRUSTS & FOUNDATIONS CONSULTANT**

### **Overview**

Norwich Theatre Royal requires a freelance consultant with considerable UK experience of raising capital sums for arts projects from charitable trusts and foundations. We expect to raise around £1.5m over the next year and a half from these sources for a new education and training centre on the Theatre Royal site.

### **Background**

Norwich Theatre Royal is an arts and education charity (No. 262259), presenting theatre to the Norfolk community and beyond. The theatre has developed a sustainable income model covering its core costs and generating an annual surplus. In the year 2012/13, we sold over 400,000 tickets and generated a net surplus of over £460,000 on turnover of £13.3m.

Lifelong learning is central to the Norwich Theatre Royal mission statement and charitable objectives: "To promote, maintain, improve and advance education, particularly by the production of educational plays and the encouragement of the arts, including the arts of drama, mime, dance, singing and music and to formulate, prepare and establish schemes therefore."

There is a strong, committed and experienced team of staff and Trustees.

Artistically the theatre has extensive relationships with touring companies including Glyndebourne, English Touring Opera, National Theatre, Royal Shakespeare Company, Propeller, Matthew Bourne's New Adventures, Rambert and Northern Ballet. The theatre's programme is consistently of high quality and is admired by its audience and supporters.

The theatre is acknowledged as a crucial element in the cultural life of Norwich and Norfolk and therefore an important part of the city and county's economic health.

More information is available on our website: [theatreroyalnorwich.co.uk](http://theatreroyalnorwich.co.uk), About Us section.

### **A brief history of fundraising**

NTR has a history of capital appeal fundraising, firstly in 1992 and more recently a modernisation appeal from 2006 to 2010 (250 Appeal). Following the reopening of the modernised theatre in October 2007 the Development Department was

established to provide a clear strategy to maintain ongoing support from those still donating to the 250 Appeal and develop new streams of income.

The theatre has a strong supporter base of 12,000 Friends (membership scheme), 200 Ambassadors (individual giving scheme) and over 100 Corporate Club members and business sponsors.

### **Building on success**

Over 6,000 children a year participate in our existing education programme (as well as attendance of over 18,000 pupils and teachers for performances annually).

Our education department works with 351 Norfolk primary schools (83%), as well as a majority of the county's secondary schools, offering backstage tours, presentations, Q&As, Teacher INSET sessions, dance and drama workshops, careers advice, theatre visits and our flagship Norfolk Schools Project – a biannual venture introducing primary schoolchildren to opera.

We run theatre training courses for children aged 7-16, and for adults – currently over 500 people take part each year in total. This year, we achieved OFQUAL validation at level 1 for this training, and are developing Levels 2 and 3 currently.

We have just formed an Umbrella Trust in partnership with two local academies (infant and secondary), with a long-term aim of embedding arts and creative activity more fully in these schools, with a particular focus on engaging boys (the gulf in educational attainment between girls and boys is now larger than at any time since the introduction of GCSEs in the late 1980s). Longer-term, we aim to recruit more schools to this partnership.

We have recently completed a pilot project with the University of East Anglia (UEA), providing technical support and planning a series of vocational workshops for their drama undergraduates and postgraduates.

We are also just over halfway through a three year project (Theatre Access Project) providing subsidised tickets, travel and educational work for Norfolk primary schools which were not engaging with professional arts activity because of lack of money. This has been funded with sponsorship from a large local business.

Our ambitions for the future of this education and training programme are now severely limited by the lack of a dedicated learning space.

We have built up a strong evidence base of improvements in the communication, problem-solving ability, teamwork, initiative, respect, adaptability, ability to work under pressure, healthy self-image, concentration, dedication, leadership skills and,

crucially, self-confidence of children and young people taking part in these activities. Allied to evidence elsewhere, there is a strong correlation between participation in, and exposure to, arts activity and arts education and improved life outcomes.

### **Local need**

In 2012, education specialists Ambitious Minds ranked Norfolk in the bottom 10 counties of England for educational attainment and aspiration. GCSE grades in Norfolk are the worst in the East of England. This is particularly true for those children eligible for free school meals, of whom only 27.9% achieve 5 A\*-C grades.

And OFSTED ratings for Norfolk schools are poor too. Only 54% of Norfolk secondary schools are rated good or better against a national average of 71%, with 63% of Norfolk primary schools rated good or better (national average 74%). (Source: November 2012, OFSTED)

### **A new capital appeal**

The theatre has developed plans to construct a new education and skills centre on its leasehold site. This centre will allow us to expand our existing work with schools, expand the number of people on our training courses (nearly all age group classes currently have waiting lists), develop and expand our work with secondary schools, and develop new partnerships in the HE/FE sectors.

On its own, this won't change the picture of educational attainment in Norfolk. But it will help to raise the aspirations and ambitions of another 6,000 people each year and, in partnership with other partners across the arts and education sectors, deliver outcomes which will contribute to changing lives in a positive way.

The cost of construction will be £3.9m for a building with a floor space of 1,165sqm. Work on the capital appeal to raise this money has already begun. The Theatre Royal's Trustees have committed £579,000 from our earned income, and we have received combined starting pledges of £400,000 from 3 local trusts. This amounts to £975,000, representing 25% of the total project cost. The Trustees have additionally committed £50,000 revenue annually, once the centre is open, to the existing £136,000 education budget. The running costs of the centre will be sustainable with this investment.

Alongside other capital appeal activity, trusts and foundations are expected to provide between £1m and £1.8m of the total appeal income (current lower and upper income estimates). Extensive research has identified around 250 UK trusts and foundations with relevant funding criteria and a history of funding arts projects. The Theatre Royal has existing, or previous, funding relationships with 35 of these.

## **The task**

The Theatre Royal is looking for a consultant to work with on this capital appeal, with strong, specific experience of raising significant sums from UK trusts and foundations for arts capital appeals.

We need to cover the following areas:

- Assessing and developing the current case for support
- Developing and building on the existing research into trusts and foundations to finalise a target list
- Revising lower and upper income estimates for trusts and foundations if necessary
- Presenting these revised estimates to staff and Trustees if necessary
- Establishing a timeline for the target applications
- Writing and tailoring applications
- Submitting applications
- Monitoring status of applications
- Reporting on final outcome of applications
- Follow-up reporting to trusts and foundations

## **Timeline**

We would like this work to start in the early part of 2014. It is likely that it will continue (depending on the final number of applications to be made) until early-mid 2015.

At the moment, building work is planned to start in autumn 2014, with completion due in late 2015.

## **Reporting and management**

The theatre operates a Development Group made up of the Chief Executive, General Manager, Marketing Director and Development Director, who will oversee the running of the appeal. The first point of contact will be the Theatre Royal's Development Director, Laetitia Webb. This will ensure that all research, approaches, applications, timings and results are correctly recorded, and are integrated into the rest of the capital appeal campaign activity. In addition, it may be necessary to occasionally attend meetings of the Fundraising Committee, a small group consisting of Trustees and other supporters, assembled specifically to support the appeal.

**Tendering**

We would like you to submit a written application, outlining your previous experience and successes with arts capital appeals, an outline of how you would approach the task, names and contact details of two referees, and a suggested fee structure for this work. This should be sent to Jill Fox, Executive PA, Theatre Royal, Theatre Street, Norwich, Norfolk NR2 1RL ([j.fox@theatreroyalnorwich.co.uk](mailto:j.fox@theatreroyalnorwich.co.uk)) by 5pm on Friday 20<sup>th</sup> December 2013.

For an informal conversation about this contract, please contact Laetitia Webb, Development Director ([l.webb@theatreroyalnorwich.co.uk](mailto:l.webb@theatreroyalnorwich.co.uk), 01603 598558) up to 13<sup>th</sup> December; after that date, Mark Hazell, Marketing Director ([m.hazell@theatreroyalnorwich.co.uk](mailto:m.hazell@theatreroyalnorwich.co.uk), 01603 598520).

We plan to hold interviews in Norwich w/c 27<sup>th</sup> January 2014.

**Accompanying documents:**

Latest version of a trust application (anonymised)

Business Plan

Annual Survey 12/13

Social Impact Survey 12/13

Latest NSP evaluation