

# **Request for Proposal for Consultancy Support with Diagnosis Phase of Review of Baptists Together Financial Model**

## **Overview of the Financial Review**

Baptist Together is a movement of around 2,000 member churches, 13 Regional Associations and 5 Baptist Colleges. The national body is called the Baptist Union of Great Britain (BUGB), but each of the churches, Regional Associations and Colleges is a separate charitable body with its own trustees and decision-making processes.

The general fund of the Union is called the Home Mission Fund (HMF) which is the primary source of funding for the work of the Baptist Union and the Regional Associations. The operation of the fund is described in [this article](#) on our website. The total income of the HMF has been in slow decline over many years, resulting in increasing pressures on the ability to fund all that we want to do.

The current model for distributing funds from the HMF (sometimes called “the formula”) has been in place since soon after the Futures Review (2013). It has been tweaked since then, but fundamentally the balance of distribution of resources is unchanged. However, the resources available for distribution have, continued to gently decline year on year.

There are continued tensions about whether the current system is equitable, and at the meeting of the Baptist Union Council (see [www.baptist.org.uk/council](http://www.baptist.org.uk/council)) in March 2021 it was agreed for a review to be initiated, with external support.

The objective for this process is to agree an updated financial model for distribution of resources from the HMF. This updated model will need to balance a range of priorities, including:

- Providing funding to achieve the objectives and shared priorities of Baptists Together.
- To reflect Baptist values and ecclesiology (e.g., balancing independence and interdependence).
- Address the concerns of the parties involved in the current model.
- Provide sufficient predictability for financial planning for all parties involved.
- Is practical to operate with clear decision-making processes and transparency on the way funds are allocated.
- Resilient to the range of likely evolutionary changes in the financial position of Baptists Together
- A framework for accountability.

The updated financial model could be a minor tweak to the existing model or a significant evolution, or a more radical reshaping. We are now seeking external consultancy support to undertake phase one of the review.

## **Outline of Phase 1 – Diagnosis**

The first phase of the review will involve gathering information from key stakeholders and stakeholder groups. The purpose of this phase is to ensure that we have a clear understanding of the current situation in tangible terms and also the perceptions of those involved in the

financial model. It is really important that the perspectives of all the key stakeholders are gathered and they feel that they have been heard.

We anticipate a range of approaches being used including surveys, some structured interviews and group discussions. We anticipate seeking views across a full breadth of the topic, including:

- The priorities for the review process
- Their priorities for the use of funding received from the HMF.
- The impact on their organisation/area of an increase/decrease in income from the HMF
- Where our current spending is effective, where it is ineffective.
- Where they think we should spend more and where they think we should spend less
- Issues with current model
- Scope of the review – do they think small tweaks, substantive overhaul or a completely different model is needed.
- Their view on the future trends in income
- Whether there should be a linkage between funds raised by Associations and the funds allocated to them

This is not intended to be an exhaustive list, but rather starting points for a discussion. Whilst the core scope of the Review is the 'formula' it crucial for the listening to be effective and authentic. All the views expressed of stakeholders should be gathered, analysed and reported. This may include the Home Mission appeal, income raising and distribution processes, and the role, cost base, organisation and governance of constituent organisations making up Baptists Together.

We have decided to seek external support for this work to bring in expertise in conducting these sorts of exercises, and also to ensure that the listening is conducted by those who are trusted to operate in an independent manner.

Alongside the listening exercise described above there will be a more tangible data gathering exercise, although we are not seeking external support for this work at this stage. The tangible data gathering will include collating analysis of finances of Regional Associations and BUGB and collating financial projections (budget, 3-year plan etc).

### **Subsequent Phases**

At this stage, only Phase 1 has been mapped out. Future phases are expected to be as follows:

- Phase 2 – Development of Options
- Phase 3 – Refinement and Agreement
- Phase 4 – Implementation

Whilst at this stage it has not been decided whether external support might be engaged in these phases, we believe it is likely to be required. We with therefore be interested to understand your capabilities in respect of future phases.

### **Scope of Work**

The scope of this project is to deliver the listening exercise within Phase 1 of the Baptists Together Review of Financial Model. This will include:

- A survey of all key stakeholders, most likely web based.

- Interviews with key individual stakeholders. We estimate that there will be around 25 interviews, including the Team Leader of each Regional Association, General Secretary of the Baptist Union, Treasurer of the Union. The final list of interviewees to be agreed.
- Focus group sessions with key stakeholder groups. We estimate around 25 group sessions, including each Regional Association, the Core Leadership Team (CLT), BUGB Trustees, BUGB Finance & Audit Committee and the Association Treasurers group. The final list of interviewees to be agreed.
- Analysis and synthesis of the information gathered to highlight key themes and issues and questions that need to be addressed in subsequent Phases.
- Reporting back to BUGB Trustees, Core Leadership Team and BU Council.

## **Project Governance**

The day-to-day point of contact for the supplier will be Richard Wilson, Support Services Team Leader at BUGB. It is anticipated that progress will be monitored by a small steering group comprising Richard Wilson, an Association Treasurer, a Regional Team Leader and a BUGB Trustee, who will meet with the consultants on a monthly basis to review progress and agree next steps.

## **Timescales**

The key milestones for this project are as follows:

- RFP Issued: 8 June 2021
- Deadline for receipt of proposals: 10am, 5 July 2021
- Selection of supplier and finalisation of contract: July and August 2021
- Project Kick-off: Early September 2021
- Joint meeting of BUGB Trustees and Core Leadership Team – 14/15 September 2021.
- Report back to CLT and BUGB Trustees –Date TBC, February 2022
- Final Report to Baptist Union Council – 22/23 March 2022

## **Response Required**

You are asked to submit a proposal covering the following elements:

- Your proposed Approach and Methodology and Project Plan
- Your proposed project team, including CVs highlighting relevant experience.
- Demonstration of your capability to carry out the work successfully including experience of similar work and understanding of Baptists Together.
- Any conflicts of interest or conflicts of loyalty and how you propose to address these.
- Any key dependencies and pre-requisites for your successful delivery of the project
- Your commercial proposal for the work, including proposed charging and terms and conditions.

Please submit your proposal and any supporting documents to [rwilson@baptist.org.uk](mailto:rwilson@baptist.org.uk) by 10am on Monday 5<sup>th</sup> July 2021.

## **Questions and Clarifications**

Should you have any questions, please contact Richard Wilson, Support Services Team Leader in the first instance on 01235 517751 or [rwilson@baptist.org.uk](mailto:rwilson@baptist.org.uk).