

Information to Tender for Organisational Change and Business Planning Consultant

Issue date: 7 October 2026

Response date: 11.59pm Monday 30 November 2026



Background

The Twentieth Century Society (C20) is the UK-wide charity, which campaigns to protect the best recent UK heritage – a huge range of amazing buildings constructed from 1914 onwards. We advise building owners, professionals and planning departments; make the case for buildings to be listed, preserved and retrofitted, run lectures, trips and tours, publish popular and academic books; and lobby the press.

We raise over £300,000 annually to do this, from sources including regular, high net worth and professional memberships, legacies and donations. Our events also make a financial contribution to our campaigns and casework.

We have recently been awarded a grant from The National Lottery Heritage Fund that will transform the organisation over the next 2.5 years. The appointment of a Business Planning and Organisational Development Consultant is central to this process. The consultant will lead a structured governance review, embed fundraising accountability at board level, develop a five-year operational Business Plan and ensure the Society has the systems, leadership and culture required to increase unrestricted income, diversify membership and scale its heritage protection work nationally.

The outcome will be a financially resilient, strategically governed charity capable of protecting more twentieth-century heritage and engaging a new generation of custodians.

Scope of works

The purpose of the commission is to lead a structured organisational development programme that delivers reform of the governance, financial resilience and a sustainable operating model, enabling the C20 to be proactive and scale up its protection of twentieth century heritage at risk. We see the work being undertaken in three phases; if you have a different view, please explain why in your tender.

Phase 1: Governance review and implementation of recommendations

1. ORGANISATIONAL REVIEW

- Review charitable objectives
- Review governance policies and committee structures
- Lead on a trustee skills audit
- Review trustee numbers, tenure and succession arrangements
- Clarify trustee roles vs staff operational roles
- Clarify volunteer roles

2. GOVERNANCE RESTRUCTURE

- Recommend revisions to current governance structure to include (but not confined to):
- New Fundraising Committee
- Terms of reference for all Committees
- Draft revised trustee role descriptions (with clear leads for priority areas)
- Develop succession planning framework

3. FINANCIAL AND SYSTEMS REVIEW

- Review Treasurer role and make recommendations on how a Finance Officer can be integrated
- Strengthen audit and risk oversight
- Advise on CRM and data governance framework
- Review GDPR compliance arrangements

4. BOARD DEVELOPMENT

- Facilitate trustee training sessions
- Embed fundraising responsibility at Board level
- Mentor Director through structural transition

Phase 2: Business Planning & KPI framework – development of a five year operational plan

- Prepare a short, but detailed business plan that clearly sets out where the C20 currently is, the wider context and aims, and a clear five year plan that includes:
- An agreed baseline of performance metrics
- 3-5 year growth targets (income, membership, case work capacity)
- Financial projections in an agreed format to align with C20 budgets
- A sustainable staffing structure post-grant
- Alignment with fundraising and membership growth to heritage outcomes
- Embedding fundraising and membership strategy
- Integrate fundraising accountability into governance
- Support KPI framework for Fundraising and Membership Managers
- Develop a reporting dashboard template for the Project Board and Trustees

Phase 3: Consolidation (Year 2)

- Quarterly review, reflection, and support for adjustments
- Mentor C20 Director – monthly 1 hour catch ups
- Workshop with Trustees to review progress
- Review income growth trajectory
- Make final recommendations for long-term resilience
- Take part in project evaluation interview with Evaluation Consultant.

Deliverables

In summary, the key deliverables are:

- A short paper summarising the findings of the governance review
- Revised governance structure showing committees
- Terms of reference for committees
- Trustee role descriptions
- Succession plan for trustees
- Framework for fundraising committee
- Board approved five year operational Business Plan including financial projections, income targets, staffing model and casework growth assumptions.

Person/company specification

The person/ company we are looking for should be able to demonstrate the following:

- Senior-level organisational development consultancy within the heritage, cultural or charity sector
- Proven experience leading governance reform in charities (including trustee restructuring)
- Demonstrable experience producing board-approved 3–5 year business plans
- Experience embedding fundraising culture within governance structures
- Strong financial literacy and charity finance oversight understanding
- Experience facilitating board workshops and trustee training
- Change management expertise
- Understanding of Charity Commission governance frameworks
- The following experience is desirable:

- Experience working with small to medium heritage charities
- Experience advising on CRM and digital infrastructure transitions
- Experience of supporting charities/ businesses that have looked at working with Millennials and Gen Z
- Knowledge of the expectations of The National Lottery Heritage Fund at this level of grant

Timetable

We are expecting this role to start in January 2027 with the majority of the work completed by the end of the year. We anticipate consolidation and mentoring to continue into 2028.

Fees

The fee for this commission is £14,300 + VAT. There is an expectation that at least 22 days' work will be allocated to the project.

Tender requirements

If you would like to apply please provide the following information to coordinator@c20society.org.uk by 11.59pm on Monday 30 November 2026.

- A summary of the knowledge and experience you bring to this project (Max. 2 pages)
- Concise, up-to-date CV(s) for the person(s) who will complete the work (Maximum 3 pages per person).
- A methodology, and breakdown of your days against tasks – if you feel we have missed something else or want to suggest a different approach to achieve our aims, please do.
- A priced offer in the format request. Please use the Form of Tender to provide VAT Registration and insurance details.
- Names of two referees – these will be taken up once a preferred candidate / company has been selected.

Tender evaluation

Each tender will be scored on value, understanding of the brief, and proven track record. The weighting of each of the criteria is listed below.

- Proven track record – this will include relevant experience, demonstrated by the summary of your experience, CVs and references (50%)
- Understanding of the brief, expressed through the methodology (40%)
- Value for money – daily rates and the number of days worked on the project (10%)

The scoring table below will be used to score the first three criteria. Failure to achieve a rating of satisfactory (i.e. a minimum unweighted score of 3 or above) in any one or more categories may result in the bid being disqualified at our discretion:

Assessment Criteria	Score
Unacceptable: either no answer is provided, or the answer fails to demonstrate that any of the project's key requirements in the area being measured will be delivered.	0
Poor: fails to demonstrate how the project's basic requirements in the area being measured will be addressed, giving rise to serious concerns that acceptable outcomes would not be delivered against the project brief.	1
Weak: barely demonstrates how the project's basic requirements in the area being measured will be addressed, giving rise to concerns whether acceptable outcomes would be delivered against the project brief.	2
Satisfactory: demonstrates how the project's basic requirements in the area being measured will be addressed so as to deliver acceptable outcomes against the project brief.	3
Good: demonstrates how most of the project's requirements in the area being measured will be addressed so as to deliver good outcomes against the project brief.	4
Excellent: demonstrates clearly how all of the project's requirements in the area being measured will be fully addressed so as to deliver excellent outcomes against the project brief.	5

The tenderer who submits the lowest overall price will receive the full score of 10% available for the financial evaluation. Remaining bids will be awarded a score proportionate to the lowest priced bid according to the following formula:

$$\text{Score} = (\text{lowest bid received} / \text{bid price}) \times 10$$

Abnormally low or high bids distort evaluation of tenders and where the C20 feels that a bid falls into one of these categories the tender will be asked to explain or clarify their bid. This includes the discounting of daily rates.

The C20 may ask tenderers to make an online or in person presentation. This will only be used for clarification purposes. We anticipate the team commencing work as soon as possible.

Please note the following:

Preparation of Tender

Tenderers are responsible for obtaining all information necessary for the preparation of their response; and all costs, expenses and liabilities incurred in connection with the preparation and submission of the Tender and attending any interviews will be borne by the Tenderer.

The Tenderer is expected to have carried out all research, investigations and enquiries which can reasonably be carried out and to have satisfied itself as to the nature, extent, and character of the requirements of the Contract (in the context of and as it is described in the Specification), the extent of the materials and equipment which may be required and any other matter which may affect its Form of Tender.

Tenderers may seek clarification on any of the points contained in the tender documents at any time prior to seven working days before the date for receipt of tenders. This will allow time for a member of staff or the Trustees to prepare a response to all tenderers by five days before the tender deadline and for all tenderers to incorporate the clarification prior to the tender deadline.

Non-consideration of Form of Tender

The C20 reserve the right not to award the contract to the highest scoring, lowest priced or to any tenderer; and reserve also the right to accept any of the same in whole or in part. The C20 may also refrain from considering any Form of Tender if it is not in accordance with the Form and Conditions of Tender, or the Tenderer does not provide all of the information required or attempts to make variation or alterations to the Form of Tender, Conditions of Contract or the Specification.

Tenderer's Warranties

- In submitting a Tender, the Tenderer warrants that:
- It has not done any of the acts in the Non-Consideration of Form or Tender,
- all information provided is true, complete and accurate in all respects including details of previous projects being presented as examples,

- it has full power and authority to enter into the Contract.
- it is of sound financial standing, and
- its partners, directors and employees are not aware of any circumstances that may adversely affect such financial standing in the future.

Confidentiality

The Form of Tender, the Conditions of Contract, the Specification, and all other documentation or information issued by the C20 relating to the Tender shall be treated by the Tenderer as private and confidential for use only in connection with the Tender and any resulting contract and shall not be disclosed in whole or in part to any third party without the prior written consent of the C20.

The documents which constitute the project and all copies thereof are and shall remain the property of the C20 (whether or not the C20 shall have charged a fee for the supply of such documents) and must not be copied or reproduced in whole or in part and must be returned to the C20 upon their request.

All information provided by tenderers as part of a tender return will be treated as confidential.

Freedom of Information

Information in relation to this tender may be made available on demand in accordance with the requirements of the Freedom of Information Act 2000.

Tenderers should state if any information supplied by them is confidential or commercially sensitive or should not be disclosed in response to a request for information under the Act and should state why they consider the information to be confidential or commercially sensitive.

This will not guarantee that the information will not be disclosed but will be examined in the list of the exemptions provided in the Act.

Appendix A: Form of Tender

Please complete this form and include it with your responses to the questions above.

Project: Modern Heritage, Future Stewards: Transforming the C20 Society for the 21st Century

Professional Service: Organisational Development / Business planning consultant

Name of Tenderer:

I/We, the undersigned, do hereby offer to execute and complete the above mentioned professional services in strict accordance with the Schedule of Services for the following lump sum fee:

£ ____ plus VAT (delete if VAT not applicable) for the development phase

Confirm figure in words: _____ plus VAT (delete VAT if not applicable)

Resources

Please state the number of days intended for the delivery and development phase

Day Rates

Please state the number of days and day rates intended for the delivery and development phases in the table below:

Team	Day Rate £	No. of days
Director/ Partner		
Senior Consultant		
Consultant		
Other – specify		

The above day rates will be utilised to negotiate any additional works that may be required if deemed to be beyond the reasonable scope of the works specified. All day rates are to be based on a 7.5 hour day and are to include allowance for disbursements.

Expenses and Disbursements

The fee offer is to include all expenses and disbursements (including printing charges).



Offer Period

This tender/ offer is to remain open for a period of 90 days from the date fixed to the return of tenders. Dated this _____ day of _____ 20__

	Tenderer to provide responses. Some are pass/ fail
Name of firm or company	
Postal address	
Registered address (if applicable)	
Company number (if applicable)	
Please indicate if you are: a sole trader, partnership, Public or Private Limited Company or other type of organisation	
Main contact	
Contact telephone number	
Contact email address	
Please indicate your level of Employer's Liability Insurance, the policy number and expiry date ¹	
Please indicate your level of Public Indemnity Insurance, the policy number and expiry date	
Please indicate your level of Professional Indemnity Insurance, the policy number and expiry date	
Signature of authorised person	
Name of authorised person	
Capacity in which signed	

¹ If you do not have any of these insurances, please indicate if you will purchase them if awarded the contract. If they are not applicable e.g. you are not an employer, please indicate this.