BUSINESS CONSULTANCY BRIEF

Organisation: Scottish Civic Trust

Role: Business Consultant to review the processes, structure and business model of The Scottish Civic Trust to ensure maximum organisational efficiency and value for money.

Estimated fee: £10,000 inclusive of expenses and VAT if applicable

Estimated duration: 6 months

Timetable: Submission deadline 5pm Monday 28th September 2026
Interviews Monday 5th October
Work commissioned Friday 9th October
Work complete Wednesday 31st March 2027

Location: Home or office based
Must be able to travel to Glasgow office for project meetings

Reporting to: Joe Traynor, Director

SCOTTISH CIVIC TRUST

Brief for a Consultant to review the business processes, structure and funding model for the Scottish Civic Trust.

The work will be undertaken from Friday 9th October 2026 with a report outlining recommendations presented to the Trust's Finance and Audit Committee in February 2027 and Board in March 2027.

OVERVIEW

The Scottish Civic Trust is the national voice for Scotland's civic and local heritage groups. Founded in 1966 to help people connect to their built heritage and countryside, preserve the uniqueness of their locality and appreciate how this connects to the wider unique character of Scotland, we work to ensure that historic built heritage, its stories, and the wider historic environment is celebrated and preserved, working to ensure it is valued in modern life and planning decisions. We take a place-based approach to involving all of Scotland's communities in celebrating our rich heritage while ensuring its relevance in the present day.

The Trust services a network of over 150 local civic, heritage, and amenity societies across Scotland. We are seeking a Business Consultant to help us review and redesign our business structures and funding model to ensure that the organisation is lead, agile and sustainable.

This is an element of a larger project to generate income, diversify funding streams and ensure that our organisation is sustainable for the future. The Business Consultant will examine our existing practices and structures, working alongside a Funding Consultant who will identify new trusts and foundations for us to approach and Partnership and Memberships Officer who will launch a Friend's Scheme for the trust, expand our affiliate membership and identify sponsorship opportunities for our programmes. The aim of the sustainability project is to generate additional income to cover the core costs of the organisation. Most of this budget currently originates from grant-funded projects and rental income from the historic property we own and maintain, the 18th-century Tobacco Merchant's House. Our National-Lottery-Funded sustainability project looks at new models for generating unrestricted core income to move away from an over-reliance on project-specific grant funding.

METHODOLOGY

The Business Consultant will specify the methodology they plan to use to meet the aim(s) and objectives of the work in their proposal. Although the intent is to examine costs, the majority of the contract should focus on methods to generate income to build a strong foundation for the Trust going forward. The Business Consultant will work closely with SCT's Senior Management Team to establish the exact parameters of the review in detail at the beginning of the process.

The resulting business review documents (please see below) will provide recommendations to the Director and Board on ways to ensure that SCT is providing value for money from its processes and structures and suggest further ways to increase core income.

Suggested phases of progression are as follows:

- Phase 1 (Research): Meet with staff and board members to gain a deep understanding of the aims, objectives of SCT and its current structures and processes, including but not exclusive of the Diverse Heritage programme, current staffing and salaries, funding sources and the current position of SCT's thinking and planning
- Phase 2 (Develop): Based on Phase 1, develop proposals to streamline SCT's processes, structures and increase core revenue sources.
- Phase 3 (Handover): A draft of this should be presented to the Director for review in October 2026 and further draft to our Finance and Audit Committee in November. The final document should be presented to Board in December.

OBJECTIVES

The consultancy project has the following primary objectives:

1. Organisations Review

Review our assumptions relating to the structure and delivery of our current programme of work, structures and income generation.

2. Business Planning Proposal

Produce a document which outlines the methodology and process taken and proposes recommendations to ensure that SCT moves to greater sustainability through its funding structures and other income generation.

This should include:

- a costed (in terms of both finance and risk) operational level implementation plan
- a feasibility study
- a cost/benefit analysis

3. Presentation

A draft should be presented to the Director and then Finance and Audit Committee for review before a finalised version is presented at Board in December 2026.

CONTRACT MANAGEMENT

Timetable

We expect the service commissioned to begin in October 2026. A draft plan should be submitted by February 2026 for review by the Director. The final document will be presented to Board in March 2026.

The consultant may be expected to contribute to the final project evaluation.

Costs

The budget for this work will be in the region of £10,000 inclusive of expenses and VAT if applicable. Payment will be on a staged basis, with an initial start-up payment of 30%, another 40% on submission of the draft plan and the remaining 30% on submission of the final Plan.

Reporting

The contract will be managed by Joe Traynor, Director, who will approve payments on production of satisfactory work. They will also monitor progress on an ongoing basis to ensure the project deadlines are met.

AWARD CRITERIA

The consultant's proposal for this project should include:

- a detailed methodology to be used in the project
- details of the staff allocated to the project including details of the lead contact and the relevant experience and competency possessed by the consultant and any other personnel who will work on the project.
- daily charging rate of individual staff involved
- full costs and expenses for the work
- a project timetable for the work
- details of two references, or client testimonials

Proposals submitted will be assessed by SCT against the following questions:

1. To what extent does the proposal demonstrate an understanding of the issues related to this brief? 30% weighting
2. To what extent are the methodology and methods appropriate to the requirements set out in this brief? 30% weighting
3. What degree of experiences does the bidder demonstrate in order to successfully complete the work? 20% weighting
4. How well has the bidder structured a team/their proposal in order to successfully manage the contract and deliver the required work to budget and timetable required? 20% weighting

PROCUREMENT PROCESS

The procurement timetable will be:

- Proposal return deadline: 5pm Monday 28th September
- Clarification/Interview: Monday 5th October
- SCT will notify bidders of our decision on Friday 9th October

Proposals should be sent by email to Joe Traynor, Director, at joe.traynor@scottishcivictrust.org.uk