

# Fundraising Services — Tender Clarification Log

Invitation to Tender · Tavistock Institute of Human Relations · March 2026

This log records questions submitted by prospective bidders in response to the fundraising services for the Tavistock Institute of Human Relations.

<b>Proposal deadline</b> Wednesday 25 March 2026	<b>Contact</b> Fatima Kamate - f.kamate@tavinstitute.org
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## Clarification Questions by Category

Question	Answer
<b>1. Financial Positioning &amp; Income</b>	
<b>Q1</b> Recent annual fundraising income (total + by source).	Current fundraising efforts are small and include small contributions to our lunchtime talk series and the occasional donation or legacy. These are contributed to our Bursary Fund
<b>Q2</b> What is the Institute's current annual income and what is the split by income streams (for example, trading, trusts and foundations, corporates, individual)?	The Institute's current income stream is derived from three core areas and includes income from our subsidiary organisation, Tavistock Institute Germany (TIG). The following are average figures over the last two years: <ol style="list-style-type: none"><li>1. Research Evaluation &amp; Consultancy Average: £671,735</li><li>2. Professional Development Average: £667,770</li><li>3. Human Relations Journal (Royalties) Average: £610,782</li><li>4. TIG Tavistock Institut gGmbH (Germany) Average: £190,247.</li></ol>
<b>Q3</b> What is the Institute currently spending on generating income per annum and how does this split across the income streams?	Income generation is undertaken by principal researchers and consultants who typically allocate 25-40% of their time to business development activities, including writing grant applications and responding to Invitations to Tender. This activity will continue alongside the fundraiser, who will be expected to generate income from new philanthropic and other sources not currently accessed by the Institute.
<b>Q4</b> What amount does the Institute need to raise for their activities per annum over the next three to five years? Does this include or are there additional amounts that relate to projects that will only go ahead if funding is secured?	We are open to your proposals and any answer to this question is somewhat dependent on the fundraiser's costs. We are realistic that the first year will need more of an outlay before seeing return on investment but would like to see incremental growth: year 1 £50-100K; Y2: £100-150K; Y3: £200K+ as a minimum. These figures represent additional income from new philanthropic and other sources, not a replacement for existing income streams.
<b>2. Strategy &amp; Timeline</b>	

Question		Answer
<b>Q5</b>	Does the Institute have or have ever had a fundraising strategy?	This ITT evolves from the ongoing strategy conversations between staff, management and council which have emphasised the importance of diversifying income and reducing dependence on journal income. Working with a fundraiser was identified as one initiative and this work is the result of a small scoping project carried out by members of the senior leadership team with support from an expert trustee. We would expect the fundraiser to work up and action our new fundraising strategy, collaborating closely with senior colleagues.
<b>Q6</b>	Is there an organisational strategy, and cashflow in place for the next three to five years?	The Institute has strategic priorities related to the fundraising outlined in our ongoing planning process (see Q5 and Q8) and a longer term CEO strategy that would be available on appointment. We maintain cashflow projections aligned with our financial year (October-September) and update these regularly based on income generation activity.
<b>Q7</b>	Any internal targets or timelines we should align with.	The Institute's financial year runs from 1 <sup>st</sup> October to 30 September. We would want to have targets in place and achieved in the year commencing 1 <sup>st</sup> October 2026.
<b>Q8</b>	Priority projects and major financial needs for the next 1–2 years.	<p>The Institute is looking to deepen its social impact through creative application of its substantial intellectual capital to societal challenges over the next few years. It would like to do this in a number of ways:</p> <ul style="list-style-type: none"> <li>• A bursary fund to enable access to its professional development programmes from a much wider range of communities including those in the Global South.</li> <li>• Secure funding for a number of proactive action research projects and programmes that have been well scoped out, including arts-based initiatives.</li> <li>• Income to support development of the ambitious fellowship scheme to sustain a global community of practice in TIHR methods and increase impact of the work.</li> <li>• Unrestricted funds to support other projects. This could include enabling TIHR to find a long-term home.</li> </ul>
<b>3. Current Fundraising Capacity &amp; Infrastructure</b>		
<b>Q9</b>	Who is doing the Institute's in-house fundraising at the moment and what is/are their title(s)?	See Answers to Q3 & Q5
<b>Q10</b>	What fundraising activity will remain in-house?	ITTs, grants and other proposals relating to core Research and Consultancy activity would continue to be led by principal researchers and consultants.
<b>Q11</b>	Has the Institute worked with external fundraisers before?	No, this is a new enterprise.
<b>Q12</b>	Current fundraising capacity and available resource.	See Answers to Q3 & Q5. Resource for the fundraiser would come from Business Development and Strategy team comprising Head of Finance, Business Curator, Senior Comms Manager, Key Principals and members of the support team. The fundraiser will have direct access to the senior leadership team to ensure organisational alignment and senior-level support and collaboration.
<b>4. Existing Data Base</b>		

Question	Answer
<b>Q13</b> Have you any individuals or corporate donors and/or donor prospects at the moment?	Some small donations that happen on an ad hoc basis. We have an extensive international network of partners in various sectors and alumni from our training programmes, which may provide warm leads into commercial and public sectors and to potential donors.
<b>Q14</b> Are there any existing live conversations, warm leads, or previously approached trusts, foundations or corporate prospects that the selected consultant would be expected to inherit or reactivate?	No, this is a new initiative and we expect the proposal to speak to that and how they would develop a fundraising culture within the specific context of the Institute's work.
<b>5. Scope &amp; Experience</b>	
<b>Q15</b> To what extent do you see the role focusing on institutional grant fundraising from trusts, foundations and public-interest grant makers, versus individual giving, major donors and legacy fundraising?	Our key emphasis is upon diversification from our current income generation model to enable new activities and greater social impact. We'd be open to any combination of those suggested so long as the new income generation activity is outside of the current business model. We don't currently get money from trusts and foundations for example.
<b>Q16</b> Given that TIHR already has in-house capability in winning grants for its core research and consultancy work, should bidders focus primarily on new philanthropic income streams for strategic initiatives and unrestricted funding, or also include institutional grant opportunities closely aligned with TIHR's applied research and public-benefit work?	See above.
<b>Q17</b> Of the priority areas listed in the tender, which would you see as the highest priorities for year 1?	<ol style="list-style-type: none"> <li>1. Bursaries and fellowships to widen access to our professional development programmes. (Y1)</li> <li>2. Action research and organisational development that will contribute to improved working life or social conditions. (Y2)</li> <li>3. Arts and creativity programmes including performances and exhibitions (Y1)</li> <li>4. Applied research to address social challenges and public policy questions. (Y2)</li> <li>5. Other strategic initiatives as they emerge (Y2/3)</li> </ol>
<b>Q18</b> Would TIHR consider transferable experience in securing and managing externally funded research, public-interest and partnership-based projects as	As an organising and strategic principle, we are always open to creative and innovative approaches. If your proposal is clear about who you are and confident about what you can offer with a supporting track record, we'd be open to hear from you.

Question		Answer
	relevant evidence, where this experience is closely aligned with applied social impact, organisational development and widening access to learning?	
<b>Q19</b>	For case studies, may bidders include examples of externally funded research and social impact projects where their role included funding acquisition, proposal development, consortium building or project leadership, even where the funding source was not philanthropic in the narrow sense?	Yes as linked to response to Q18.
<b>6. Budget</b>		
<b>Q20</b>	What budget/budget range has been allocated to the fundraising services you are looking to secure?	We haven't given a budget because we realise that costs will vary depending on the kind of organisation or individual who responds. An organisation with a team might need a higher budget but with that we would expect more ambitious goals and a quicker return on investment. Average income has been provided from the last two financial years and some growth is anticipated this year (without the fundraiser). We would expect an expert fundraiser to propose a budget for the work that is sustainable for us over the next year and doesn't expose us to excessive risk.