



HESTERCOMBE
where creative ideas grow

Request for Proposal

Developing a fundraising strategy at Hestercombe Gardens Trust

About Hestercombe Gardens Trust

The Hestercombe Gardens Trust (HGT) is an independent charitable trust that owns and manages the 320 acre Hestercombe Estate, located five miles north of Taunton, Somerset.

Hestercombe is famous for its unique collection of gardens, which span four centuries of garden history and design. It is the only historic landscape to have within it four complete period gardens; the Formal Garden is hailed as one of the finest examples of the world-renowned partnership between garden designer Gertrude Jekyll and architect Sir Edwin Lutyens.

The whole site is a listed Grade 1 on the Historic England Register of Parks and Gardens. Hestercombe House is Grade II* listed and forms the focal point of the Hestercombe Conservation Area. The house and stables are also designated as a Site of Special Scientific Interest and European Special Area for Conservation as Lesser Horseshoe bat roosts.

Hestercombe House and Gardens have undergone acclaimed restoration works and continue to develop and grow, giving our visitors a stunning setting to explore, learn and relax.

The principal objects of the charity are for the advancement of education and benefit of the public to:

- (1) reclaim, restore, preserve, enhance and develop the landscape, gardens and buildings of heritage, horticultural or architectural interest associated with Hestercombe; and
- (2) maintain develop enhance and preserve and provide public access to archives, databases and collections relating to landscapes, gardens, and buildings of heritage, horticultural or architectural interest; and
- (3) undertake and support educational work and research and provide resources for the public relating to landscapes, gardens, and buildings of heritage, horticultural or architectural interest.

The vision of the charity is for Hestercombe to be a place *where creative ideas grow* and its mission is *to build on our heritage of innovation, culture, creativity and green care, by developing public spaces that generate opportunities for health and happiness for everyone.*

Financial model

HGT has historically taken a very commercial approach to running the organisation.

To a large extent, the financial model is driven by visitor numbers. A substantial proportion of overall income is generated through admission/membership fees and secondary spend made on catering or in the retail space that is located in the Gallery. Hestercombe has also developed an offering as a venue for both the weddings market and other functions. Catering, Functions and Retail are classified as trading activities and are run through a wholly owned subsidiary, Hestercombe Gardens Limited.

The net profit derived from these trading activities, alongside revenues from admissions and membership, and the rental of various buildings and spaces around the estate, support organisational overheads (core cost) and allow HGT to invest in activities that align with the organisation's charitable objectives, notably planned restoration projects around the estate and maintenance of the gardens.

Non-commercial income forms a much smaller proportion of the organisation's consolidated income. Historically, fundraising in the traditional sense, notably from Trusts & Foundations and high net worth individuals, has been focused on capital projects. In this respect the organisation has been very successful in raising substantial sums of money but very little funding has been generated to support revenue costs. Management and trustees increasingly recognise that there is limited capacity to increase income through visitors and corresponding commercial activities, and there needs to be a renewed focus on developing fundraising capacity that will either generate unrestricted funding or that will support existing or anticipated revenue costs.

HGT's financial year runs Jan-Dec. For 2021, budgeted income is £1.865m: £1.056m through the charity; and £809k through the subsidiary. The table below summarises income by activity stream:

	Stream	£'000s
Hestercombe Gardens Trust (the charity)	Membership	314
	Admissions	269
	Gallery income	56
	Other (incl property rental income)	274
	Fundraising	142
Hestercombe Gardens Limited (subsidiary)	Shop	90
	Restaurant	459
	Functions/Events	154
	Catering for Functions/Events	105

Trading income has been severely impacted by the COVID-19 pandemic. As described above, HGT's financial model is largely driven by visitor numbers. In 2019, visitor numbers were in excess of 83,000. This dipped to 50,000 in 2020; the 2021 budget assumes that visitor numbers will be close to 70,000; and it is anticipated that visitor numbers will recover to pre-COVID levels in 2022. The pandemic has also heavily affected income linked to Functions. In 2018, combined Functions/Function catering income was c£550k, driven largely by a high number of weddings. This dropped to a little over £30k in 2020.

Conversely, Hestercombe has been well supported by NLHF's Cultural Recovery Fund, receiving £124k in 2019 from CRF1 and £649k in 2020 from CRF2 (substantially in excess of what was budgeted).

Whilst the last eighteen months has been very difficult, resources have been managed very effectively, HGT has been well supported by key sector funders and the organisation feels that it is in a good position to recover from the shock of the pandemic.

Strategic Context

Whilst recovery from the impact of the COVID-19 pandemic is a key operational priority, the organisation remains focused on a delivering a number of long-term strategic priorities.

In early 2021, Sir Andrew Burns stood down as chair and was replaced by David Yiend. Trustees used this as an opportunity to review the 10-year strategy that had been initially agreed in 2017. The strategic objectives were agreed, although additional detail linked to how each objective would be fulfilled was added. A summary of the strategic objectives is included at the end of this paper.

One of these priorities is the restoration, redevelopment, preservation and interpretation of Hestercombe House, which stands at the centre of the Hestercombe Estate. Hestercombe House was the subject of a £5m bid to NLHF in the summer of 2019. Sadly, this bid was not successful but HGT was encouraged to reapply. The intention is to go back to NLHF in early 2022. The restoration of Hestercombe House will be the subject of a capital appeal (with NLHF as the cornerstone funder). That appeal is not the focus of this commission, although how revenue fundraising and the capital appeal work alongside one-another is an important issue.

In addition, trustees also agreed that substantial focus should be given to the role that Hestercombe and its assets could play in supporting the wider public health and wellbeing agenda.

What we need support with

Over the last 25 years, HGT has had considerable success in generating capital funding, largely driven by the Chief Executive, to support major elements of the restoration of the gardens and the development of Hestercombe as a heritage destination. Operational costs are supported by income derived from visitors and members, and associated trading activities.

Undoubtedly there is opportunity for HGT within this landscape. In excess of 4,000 supporters and tens of thousands of visitors represent significant potential; and as our engagement and education work develops and expands there is the potential to look at supporting the revenue costs associated with these activities through Trusts & Foundations.

But fundraising at Hestercombe is not systematised and we are seeking support to help us understand how we might design and operationalise fundraising within the organisation. Specifically, we would like to understand:

1. What fundraising channels would present the greatest opportunity for us?
2. How we might best exploit that opportunity?
3. What infrastructure – in the broadest sense – do we need to put in place/investment do we need to make to develop and systematise fundraising at Hestercombe?
4. What are the strengths and weaknesses of our Hestercombe as a fundraising proposition? How can strengths be consolidated and weaknesses be overcome?
5. Likely return on investment and 'pay-back' period?

Deliverables

We envisage the above coming together in a high-level, three-year fundraising strategy that runs from 2022 to 2025, accompanied by fundraising plan for the first year of the strategy.

Both documents should also include:

- an executive summary of no more than one page, and
- a slide deck summary comprising 4-8 PowerPoint slides.

Timeframe

Proposals to be received by 5pm on Friday 15th Oct. Interviews and project commissioned in the two week period 18-29 Oct.

Project delivered by Friday 24 December.

Budget

We anticipate proposals in the range of £8,000-10,000 (plus VAT, if applicable).

Cost will not be the determining factor in how we commission the work but we do want to achieve good value for money.

Hestercombe Gardens Trust is based just outside Taunton in Somerset. It is not necessary of the consultant to live close to Somerset although we would anticipate that they would need to visit at least once during the term of the commission. We will recoup reasonable costs associated with any visit to Hestercombe.

How to respond

If you are interested in working with us, please send us a proposal of no more than two pages, covering how you would approach the project, an outline project plan and summary of why you are the best person to support us.

Please also include a CV that contains at least two trade references. We will not contact any referee without your prior consent.

You should be available for a virtual (Zoom) meeting with us, which will last approximately 45 minutes, in the period 18-29 Oct.

If you have any questions or queries about this brief, please contact Chris Triggs, who is supporting us with this work. Chris can be reached on chris.triggs@gmail.com or 07967 713717.

Additional resources

You can find out more information about Hestercombe at www.hestercombe.com.

A copy of the latest annual review is available [here](#) and Hestercombe's latest statutory filings are [here](#).

Strategic objective	Detail
Reuniting, restoring and conserving the Estate	The Hestercombe Estate and Gardens is a unique and nationally significant historic landscape. Ensuring that the historic, registered landscape is united, under the control of HGT, and restored and preserved for the enjoyment of future generations is central to our objectives as an organisation.
Hestercombe House	The restoration, redevelopment, preservation and interpretation of Hestercombe House is one of the last major components of the original ambition of HGT. We see a restored Hestercombe House as the cornerstone of future plans; it will allow us to both showcase our heritage and be a base for our engagement, learning and cultural activities; and it provides us with additional opportunity to generate income that will support the organisation in the future.
Visitor Experience and Engagement	Giving visitors an opportunity to explore, learn and relax is at the heart of everything that we do. We should provide visitors with facilities that provide the key elements of a first class experience, including high-quality catering options, function spaces and retail opportunities. In turn, this supports our objective of ensuring financial sustainability. In addition to this, we will ensure that the visitor experience, including the way in which we present our heritage, supports and promotes our objective to improve public health and wellbeing.
Learning & Research, including Archive and Collections	Our growing collections and archive, not only provide the roots for learning, research, understanding and interpretation of Hestercombe's history, heritage and reach, but also present us with the opportunity for contemporary collecting, thus leaving a legacy for future generations to understand new Hestercombe histories moving forward. Combined with our physical landscapes and buildings, our collections present key opportunities for national and international engagement.
Social Inclusion & Public Health and Wellbeing	The assets and resources of HGT, including the historic landscape, the wider estate and our heritage should be used to promote and support the wider public health and wellbeing agenda, in a way that is inclusive and accessible to all.
Financial Sustainability	In the fulfilment of its objectives, HGT recognises the need to ensure that it is operating on a financially sustainable basis. To do this, we will both consolidate and develop our existing trading activities (whilst ensuring that we operate in a way that is consistent with our values) and enhance our ability to generate charitable funds through both capital and revenue fundraising.