

**WWF UK Grant System:**

**Review, Comparison & Recommendations**

October 2021

**Background information:**

Our world is under greater pressure than at any point in history, and humanity faces some truly daunting challenges. We will need to feed a global population that’s likely to be approaching 10 billion by 2050. We must limit global temperature rises and improve resilience to bring climate change under control. And we need to halt and reverse the loss of nature, the life-support system that we all depend on. Failure to address all three of these potentially competing demands could lead to catastrophic social, environmental, and economic consequences. But achieving these goals promises great reward for our health and prosperity.

To meet these challenges, the Conservation Programmes’ Department in WWF UK, plays an important role within the WWF global network. Not least through its ability to raise, distribute and manage funds to its partner offices across WWF worldwide, while complimenting similar efforts being made by other offices in the network and consistently upholding the Network standards. Its ambition is to double the amount of funds it raises and distributes during the next 3-5 years, have an efficient and effective grant system for achieving this and enable the transfer of capacity to partner offices, as applicable and relevant.

To ensure that WWF UK can be as efficient and effective as possible, we are keen to review our grant system, from start to finish, to ensure that during the coming years it will:

1. Deal with the rising needs of due diligence, flagging risks and environmental and social safeguards
2. Demonstrate best practice, in terms of maximising a process centred cost reduction approach to deliver to the needs of multiple stakeholders (both internal and external), consistently and to the highest standards.
3. Provide a user-friendly, service-design approach, that speaks to the needs of multiple stakeholders across WWF UK and the WWF network
4. Acts as an integrated system, that connects seamlessly to our organisational operational model, our organisational goal, Thriving Habitats & Species, other organisational systems, like the finance ecosystem, as well as enables capacity transfer to our partner offices
5. Aligns to WWF International’s proposed grant management system/platform (under development to serve WWF International and its managed offices)
6. Be adaptable and able to adapt to both external and internal factors, e.g., from a pandemic to and any subsequent refresh of our organisational strategy, to small improvements based on use and learning
7. Align with at a minimum the Network standards and have the flexibility and capacity in some cases, to meet a higher standard determined either by a funding body or our own protocol
8. Provide clarity of approach, in relation to different scenarios with our partner offices, e.g., Partnership Agreement, ad-hoc projects, UK grantees, regional or cross-continental programmes.
9. Offer clear indication of stoppages, bottlenecks and other barriers to efficient performance across the system.
10. Be able to respond to the different types of funding sources, both restricted and unrestricted.

To achieve these aims, the Conservation Programmes’ team require expertise to conduct a review of our existing grant system at WWF UK, analysing the system, processes and procedures, against both our needs as well as sector benchmarks and approaches, with the aim to assess its effectiveness, improvements and a proposal on any step change that they system requires to meet the needs of WWF UK for the next 5 years and beyond.

**Project Scope and Objectives:**

The scope of this assignment is outlined below:

1. Conduct an initial review of the grant system (roles, processes, procedures, policies, manual, scheme of delegation, etc), against organisational needs, efficiencies, sector compliance, due diligence, social and environmental safeguards, Network standards and other relevant factors. This work would involve targeted engagement with WWF UK/Network Offices/International Network office partners and UK based grantees to identify issues, gaps, task optimisation and similar.
2. Working with a WWF UK Business Analyst who will be reviewing the finance ecosystem, identify the overlap and synergies between the grant and finance ecosystems.
3. Identify the most significant inefficiencies, challenges and problematic areas that are causing WWF UK to encounter delays, work sub-optimally, or will stop it from growing its capability to distribute larger, possibly more complex and either higher or fewer number of grants to specific regions or thematic areas.
4. Identify opportunities for improvement within each area of the grant system, including eliminating wasted effort time and costs, identifying lean processes and service design approaches.
5. **Identify tested, proven and functioning efficient and effective systems and processes, for grant-making and portfolio management, that in turn will be able to distribute and manage the increased ambition of WWF-UK, e.g., £40m+ over the next 3-5 years. This may include reallocation of tasks from WWF UK to its partner offices, to facilitate this growth or/and uploading the grant system onto a web-based platform or a module-based software system, to be assessed by the consultant.**
6. **Review the information management system for grants (including Sharepoint storage) and define with the key stakeholders how to make improvements that will integrate relevant parties working together on grant management.**
7. **Identify any additional grant related actions required, pertaining to the Conservation Programmes’ recent internal audit report and any obligations of the UK Charity Commission.**
8. As possible, map the estimated potential time and cost saving of the new approaches and methods including suggested indicators, targets and appropriate baselines, including the setup and adoption of any new system.

**Outputs/Deliverables:**

1. During the course of the review, the flagging of quick wins, low hanging fruit and immediate benefits that can be realised - incorporating these into the summary of key findings and actioning any, as possible
2. A report summarising key findings:
	1. The identification and mapping of the lean processes (both areas of waste and opportunities for improvement),
	2. The ideal service design approach being proposed
	3. Quantification of the benefits, learnings and estimate for potential savings, over time, for the recommendations
	4. Possible technological solutions that are being proposed, with options
3. Case studies, for alternative grant systems, demonstrating their advantages and disadvantages (and key contact personnel as applicable)
4. A mapping of grant related tasks and functions, with the location of them, either within WWF UK departments, or country offices
5. Specific recommendations in relation to the CP audit report, as relevant
6. A phased roll-out plan and budget to realise the improvements; short to medium term timeline
7. A slide deck providing an overview of the review and its recommendations, with the costs and benefits clearly highlighted

**Terms of Reference**

1. Outcome: Clearly defined Financial Processes that Support Grant Making across WWF UK:
2. Review the existing financial pain points, relating to the grant budgeting, reporting and management process (document developed by CP, with Finance feedback – June 2020 and July-August 2021 – currently 20 cluster areas, e.g., carry forward, forecasting, payments.
3. Identify 1-3 options on the way forward for each point, presenting them to the CP-Finance leadership teams, for consideration and agreement
4. Ensure that existing Network Standards, Network processes underway, e.g., due diligence guidance, other country offices’ processes, as well as former operational practices are all considered
5. Ensure grants to non-WWF offices are considered along with the receipt of income from other network offices
6. Document agreements with exceptions noted, against relevant categories, to become formal guidelines and procedural documentation and stored in single place on arena
7. Develop infographic (with designer if required), to show the flow diagram of any financial categories, with multiple options or pathways

1. Outcome: Efficient and Effective Grant Making Process:
2. Ensure the existing mapping of the grant making process is complete and comprehensive
3. Identify whether improvements to the existing process will suffice, or a blank sheet of paper, i.e., starting again is a better approach
4. Develop the improved or new grant making and portfolio management processes in collaboration with all relevant parties (to include elements that may be lacking in the current process e.g., R3 review, variance analysis, regular reporting, dialogue with country offices) and roll it out, within the context of ongoing demands around what needs to continue to be delivered
5. Ensure roles and responsibilities are clearly defined and understood for each task across CP, DE&I and Finance
6. Consider the structure of the programme finance team to ensure total alignment to the outcome of this review and recent strategy refresh

1. Outcome: Efficient and Effective Processes, Procedures and Systems across the WWF UK Regions of Latin America, Africa and Asia:
2. Assess the similarities and differences of processes and systems utilised across the regions
3. From this assessment, and consideration of processes adopted in the other goals, identify best practice and develop a process map to improve and upgrade regional practices
4. Collaborate with each region, to roll out best practice and ensure a consistent approach

**Timelines:**

Assignment to commence November/December 2021.

We suggest a 3-to-6 month assignment, period, depending on the resources and efficacy of the contracted party.

**Roles and responsibilities [if applicable]:**

The supplier/consultant shall:

* Be under the direction of the Conservation Programme’s Director managing this assignment. Importantly WWF UK, have identified a secondment position from the Conservation Programme’s Department, to work with the consultant, at 50% of his/her time. This position will work alongside the consultant, to provide insight and outreach across the WWF organisation, whilst supporting and undertaking some of tasks that will be required in the objectives listed above.
* Commit to regular check-ins with WWF (at least weekly) and inform WWF if and when issues arise between these check-ins.
* Provide the outputs/deliverables as stated above

WWF UK shall:

* Delegate a colleague to work closely with the consultant – as above this will be a secondee from the Conservation Programme’s department
* Establish a steering group to oversee, support and give direction as needed
* Work closely with the selected supplier, convene relevant staff as required to meet with the consultant
* Provide feedback on draft versions of the report.
* Provide a list of resources which can be used as a starting point for research (including prospective interviewee names and documents).
* Be on hand to answer queries.
* Provide final sign-off of report.

**Submission of Proposal:**

Proposals should be maximum 5 pages in length and include:

* Your approach and proposed method to address the Project Scope, Objectives and Outputs.
* A project plan detailing proposed approach and timeframes for deliverables.
* Details of relevant experience.
* A fee proposal including total days and day rates for each member of staff who will work on the project, and any non-staff/travel/ancillary costs, including any applicable charity discounts.
* Names and CVs of all staff who will work on the project, and proposed roles (can be beyond the 5 pages).
* Indication of acceptance of WWF-UK’s standard terms and conditions (attached and available on request), or submission of your own for review by our legal team.

WWF UK will evaluate proposals against the following criteria:

* Quality of the submission and adherence to the brief.
* \*Relevant organisational experience, expertise, and skills of staff.
* \*Cost, value for money and overall resource inputs.
* Quality and effectiveness of the proposed methodology and ability to deliver the brief.

*\*In the event of a large number of responses to this opportunity, WWF-UK reserves the opportunity to shortlist proposals based on these criteria.*

**Closing date to submit proposals:**

Interested parties should send their proposal to the contact below by email not later than **Monday 22nd November 2021 at 12.00 GMT**. Applications received after that will not be considered.

**Budget:** range from £20k - £50k, will be considered.

**Submission deadline: Monday 22nd November 2021**

**Commissioned by:**WWF-UK, Living Planet Centre, Brewery Road, Woking, GU21 4LL

**Contact person:** Helen Gibbons, via Procurement@wwf.org.uk, Director of Conservation, WWF-UK

*Any costs incurred in responding to this opportunity are entirely at risk the risk of the bidding organisation. WWF-UK is not obliged to appoint a supplier through this process, and if no response is considered satisfactory, no appointment will be made. In particular, WWF-UK is not required to select the lowest priced provider.*