

## Revive MS Support

### 3-Year Organisational Fundraising Strategy 1 April 2018 to 31<sup>st</sup> March 2021

#### 1. Introduction

Revive MS Support (Revive) moved into a new therapy centre at Moorpark Court in Govan in October 2017. The centre was bought and fitted out with monies raised from a successful £1.5m capital fundraising appeal.

The new centre has enabled Revive to introduce significant improvements in service delivery for its clients and enhanced the working environment for staff and volunteers. There has been a notable increase in client demand since the move and Revive is now in a strong position to expand its services towards its mission of being Scotland's leading provider of support to people with MS and their carers.

The increases in numbers of clients and range of services has led to an increase in operating costs and these will inevitably increase further as more development is introduced. The need for a greater focus on fundraising to secure the necessary funds is self evident.

#### 2. Aim

The Aim of this Fundraising Strategy is to set out how Revive will seek to raise the monies required to cover existing service/project delivery, core operational costs and planned new services over 3 financial years from 1 April 2018 to 31 March 2021.

#### 3. Context

Revive is in the process of carrying out comprehensive Strategic and Clinical Reviews which will not be completed before July 2018. The results from both these reviews will inevitably have to be incorporated into the detail of the fundraising strategy and programme. In the immediate term, however, it remains important to establish the direction of the Fundraising Strategy and set out detailed action plans for 2018/19 whilst ensuring that flexibility to incorporate changes is maintained.

A SWOT analysis (see Appendix A) was conducted in July 2017 which was informed by consultation with Revive Trustees, Senior Leadership Team, Fundraising Team and Volunteers; the results are taken into account in this Strategy.

An analysis of competitors was also carried out which has also informed direction of this strategy

A key aspect of future fundraising for Revive must be to ensure that all fundraising activity is fully integrated into the overall plans for the organization and is effectively conducted. To that end, this Strategy needs to be kept under review and adjusted as necessary and staffing needs to be maintained at a level to meet all fundraising demands with strong leadership to ensure all activities impacting on fundraising are properly coordinated.

#### **4. Financial Requirements**

The current estimate for total expenditure on service delivery and core costs over the next 3 years is £2,214,675. Income secured for the same period is £1,138,785 leaving a gap of £1,075,890 (2018/19 £305,775; 2019/20 £357,961; 20120/21 £412,154) to be found through fundraising activities. This does not allow for any new developments in service delivery.

The known detail for expenditure and income is shown at Appendix B.

#### **5. Way Forward**

Existing funding sources need to be nurtured to secure further income from them where possible. In addition, it will be central to the success of Revive (and its aim to maintain and expand its ability to support an increasing number of clients with the services they require) that new sources of income be successfully introduced.

The following Objectives below have been identified for Year 1 (2018/19) to introduce new fundraising management procedures, meet the funding gaps and lay the foundations that will lead to more focused income generating activities in Years 2 and 3. Achieving these objectives will address many of the weaknesses and opportunities recognised in the SWOT Analysis and ensure that required funding is secured.

- Objective 1: Formalise fundraising leadership, coordination and communication
- Objective 2: Raise £230,000 in grants from Trusts & Foundations, Companies and Statutory bodies in Year 1
- Objective 3: Raise £60,000 from Revive led events in Year 1
- Objective 4: Develop individual good will fundraising achieving £30,000 in Year 1
- Objective 5: Develop the web site as a fundraising Platform
- Objective 6: During 2018/19 develop the new areas of fundraising identified in the SWOT
- Objective 7: Develop e-tapestry as an integrated fundraising tool

The above Objectives provide the focus for the organisation to achieve the identified funding needs. In addition, however, there will be unsolicited fundraising (eg events not organised by Revive and individual donations) which will require the support and/or recognition of Revive through attendance, presentations and any other supportive activities to encourage volunteers. This requirement will be monitored and controlled by the monthly fundraising progress meetings.

#### **6. Action Plan**

The Fundraising Action Plan for 2018/19 is attached at Appendix C. Specific actions are identified against each of the above Objectives, showing individual responsibility and time frames for each action.

*20<sup>th</sup> December 2017*

## FUNDRAISING ACTION PLAN 2019/20 - YEAR 2

Key: (SMT - Senior Management Team; SMT includes: CE - Chief Executive; D&LM - Development & Liaison Manager; F&FM - Finance and Facilities Manager; FT - Fundraising Team; FT includes: FM - Fundraising Manager; SGM - Senior Grants Manager; HF&C - Head of Fundraising & Communications)

### Objective 1: FORMALISE FUNDRAISING LEADERSHIP, COORDINATION AND COMMUNICATION

Action	By Date(s)	Who	Purpose	Progress
1.1 Senior Management Team to agree who will manage/direct the Fundraising Team and oversee progress of this Fundraising Strategy.	14 <sup>th</sup> January 2018	SMT	Monitoring progress against each FR Objective	Agreed this will be D&LM - Angela Feherty
1.2 Define responsibilities of SMT member monitoring strategy	14 <sup>th</sup> January 2018	SMT	As above	Achieved
1.3 Formalise calendar for FR update meetings with SMT member (D&LM)	31 <sup>st</sup> March 2019	D&LM and FT	To monitor progress against actions	Achieved
1.4 Agree how Fundraising progress/updates will be reported to Trustees and introduce new joint FR activity report template	31 <sup>st</sup> March 2019	FT/CE/D&LM	Provide Trustees with clearer understanding of all fundraising activity/ current funding gaps/challenges/resources required to meet gaps/support that can be provided by Trustees	Agreed
1.5 Recruit Fundraising specialist on to Board	1 September 2019	CE	Develop understanding of Trustees not familiar with fundraising and to ensure that support is provided/coordinated to Team as required. Clear direction	KJ recruited but gap still remains for specialist
1.6 Set up regular update on FR for all staff and volunteers	28 February 2018	D&LM/ HF&C	Ensures all understand importance of FR and are engaged in process	Achieved

**Objective 2: RAISE £....? IN GRANTS FROM TRUSTS & FOUNDATIONS, COMPANIES AND STATUTORY BODIES (NB this target does not include annual grants from NHS Greater Glasgow & Clyde, NHS Lanarkshire or South Lanarkshire Council)**

<b>Action</b>	<b>By Date(s)</b>	<b>Who</b>	<b>Purpose</b>	<b>Progress</b>
2.1 Employ full time experienced Grants Manager	1 <sup>st</sup> December 2017	CE	Maximise income available to Revive through grants	Achieved. Kevin Dillon takes up full time post as Senior Grants Manager on 1 <sup>st</sup> Dec 17
2.2 Agree which of the 2019/20 core and service funding gaps could be met through grant applications	30 <sup>th</sup> April 2019	SGM	Provides clear understanding of short, medium and long term requirements to complete Action 2.3	Funding gaps agreed and added to Grant Management Spreadsheet -- ongoing
2.3 Prioritise applications according to service needs/dates and complete grant application pipeline for 2019/20	30 <sup>th</sup> April 2019	SGM	Provides staff with advance notice of what supporting information will be required to complete applications	Achieved and ongoing
2.4 Review deadlines for Funding reports, what information will be required to complete reports and who will be required to provide information	30 <sup>th</sup> April 2019	SGM and D&LM	Ensures Funders' monitoring and evaluation requirements are being carried out by relevant staff	Achieved and ongoing- Project team set up to ensure info flow- Kevin, Magz, Angela
2.5 Agree Grant Target for Year 3 and resources that will be required to achieve it	February 2020	SMT and SGM	Allows other FR targets to be set to meet funding gap	

### Objective 3: RAISE £60K NET FROM REVIVE LED EVENTS

Action	By Date(s)	Who	Purpose	Progress
3.1 Agree the Revive led fundraising events that will be run during 2020/21 to achieve target	28 <sup>th</sup> February 2020	FM HF&C	Enable focus on current successes. Ensures all planned events have clear focus on achieving primary aim of raising money. Clear focus for year. Plan ahead.	<i>Under discussion</i>
3.2 Establish budgets for each event, anticipated income and identify any additional support/resources that will be needed to ensure targets are achieved	28 <sup>th</sup> February 2020	FM F&FM	Ensure events maximize financial return on investment	<i>Under discussion</i>
3.3 Agree and test one new Revive led event or build on last years with realistic net target of £3k to £5k and potential for development beyond Year 2	30 <sup>th</sup> April 2019	FM& HF&C	Provides flexibility to develop and try out new initiatives. Key to future planning. Developing/attracting new supporters	Fun day replaced by several centre based events
3.4 <i>At CEO's request</i> , conduct full written review of each event within 3 weeks,	Ongoing	FT F&FM	Ensure that FR events are making sufficient return on investment	<i>Clarified at December 2019 SMT</i>
3.5 Agree 2020/21 Revive led events Calendar and Targets including assessment of resources that will be required to achieve them	28 <sup>th</sup> February 2020	FM with FT	Plan ahead and identify additional investment required to increase income	<i>Under discussion</i>

**Objective 4: DEVELOP INDIVIDUAL GOOD WILL FUNDRAISING ACHIEVING £44,500 IN YEAR 2**

Action	By Date(s)	Who	Purpose	Progress
4.1 Identify list of sponsorship events run by external organisers throughout the year and set out marketing plan and promotion timeline for each event	Ongoing	FM/ HF&C	Maximise returns from Good Will FR	Achieved and ongoing
4.2 Agree merchandise that will be required to support individual sponsorship fundraisers	Ongoing	FT		Ongoing
4.3 Ensure all relevant details of participants are added to ETap	Ongoing	FM		Ongoing
4.4 Review progress and agree actions at each FR Team meeting	Ongoing	D&LM and FT		Ongoing

**Objective 5: DEVELOP WEB SITE AS FR PLATFORM**

Action	By Date(s)	Who	Purpose	Progress
5.1 Review website and agree areas that need to be improved/developed to support/improve FR opportunities	Ongoing	FT	Team is able to fundraise effectively/direct people to site with confidence/recruit volunteers for events (and clinical services where appropriate)	Volunteer page updated  Cara posting 2020 events and news on website
5.2 Prioritise changes and set out realistic timeline to implement changes	December 2018	FT		As above
5.3 Ensure Fundraising Section of web site is kept up to date and review at each FR Meeting	December 2018	FM with HF&C	Fundraising section to be streamlined	Achieved

**Objective 6: DURING 2018/19 DEVELOP THE NEW AREAS OF FUNDRAISING IDENTIFIED IN THE SWOT**

Action	By Date(s)	Who	Purpose	Progress
6.1 Agree a Development Plan to introduce following: a) Individual Giving	a) end December 2019	a) HF&C		

b) Major Gifts	b) end August 2019	b) Led by CE & SGM		Legacy campaign successfully launched (Phases 2 & 3 in December & April)
c) Legacies	c) October 2019	c) SGM/FT		

### Objective 7: DEVELOPMENT OF E-TAPESTRY AS INTEGRATED FUNDRAISING TOOL

Establish E-Tapestry as a functioning and unitary source underpinning fundraising and non-clinical communication operations.

Action	By Date(s)	Who	Purpose	Progress
7.1 Audit of existing e-tap records Run 2 separate queries on all intact records: (a) Full Name & Address; (b) Full Name & E-mail Address.	28 <sup>th</sup> Feb. 2018	SGM, FM, Carolyn	1 <sup>st</sup> stage of cleansing exercise. Next stage underway	Completed Legacy campaign launched Oct 19
7.2 Deep-dive appeal to all individual supporters in e-tap with full name and address on record.	30 <sup>th</sup> March 2018	SGM, FM, with input from SMT and FT	Data cleansing; Establishment of definitive donor pool; GDPR compliance; Prepare ground for future appeals.	Completed
7.3 Deep-dive e-appeal to all constituents with e-mail addresses.	30 <sup>th</sup> March 2018	As above	As above.	Completed
7.4 Introduction of New Contact Pro-Forma:	30 <sup>th</sup> April 2018	SGM	Record contacts with all visitors who have a legitimate interest in our work/building our potential supporter base.  Gather consistent data in support of communications and fundraising functions; Long-term GDPR compliance.	Completed
7.5 Training for staff (as appropriate) on E-tap requirements & usage.	Under review	Carolyn, SGM and FM	Harmonise use of E-tap, where appropriate, across Revive.	Training for SMT potentially in Nov 19
7.6 E-tapestry real-time update - establishment of voluntary labour pool to maintain E-tapestry.	Ongoing from 3 <sup>rd</sup> April 2018	Carolyn	To add, update and maintain e-tapestry records on a daily basis.	Ongoing

<b>Strengths (internal focus)</b>	<b>Weaknesses (internal focus)</b>
<ul style="list-style-type: none"> <li>• New Therapy Centre is <u>only one of its kind</u> in Scotland providing a ‘one stop shop’ for all therapeutic care and support needs of clients with MS and their carers (USP)</li> <li>• Employ Specialist qualified and experienced clinical staff with detailed understanding of the range of symptoms of MS</li> <li>• All services are offered free of charge</li> <li>• All services provided receive positive feedback from clients</li> <li>• Distinguishable brand</li> <li>• Excellent accounting procedures giving detailed breakdown of all costs and sources of income</li> <li>• Uses resources efficiently – every £1 donated – 85p is invested directly in client services</li> <li>• Up to date database (ETap) of all supporters and type of support</li> <li>• Secures major grants from statutory and voluntary organisations – achieving 80% success rate</li> <li>• Achieves successful Corporate Partnerships contributing to annual income and in kind support</li> <li>• Growing volunteer base</li> </ul>	<ul style="list-style-type: none"> <li>• Fundraising requirements (including annual target, funding gap, ROI, voluntary income) are not clearly understood by trustees, staff and clients</li> <li>• Team not currently working to a clear strategy or action plan</li> <li>• Over reliance on NHS funding</li> <li>• New written marketing strategy/support to coordinate PR, advertising, social media use and online presence required</li> <li>• Insufficient staff to manage growing fundraising opportunities (e.g. third party events, corporate partnership interest, securing grants)</li> <li>• Detailed data and information (quantitative and qualitative) of direct benefit to clients of Revive support is disparate and non specific and evaluation is not coordinated</li> <li>• Not all Revive led events achieve expected income</li> <li>• PR opportunities not always exploited</li> <li>• Not making best use of potential of individual giving</li> <li>• No fundraising policy and procedures</li> <li>• Potential of ETapestry database to support fundraising is not being maximised</li> </ul>
<b>Opportunities (external focus)</b>	<b>Threats (external focus)</b>
<ul style="list-style-type: none"> <li>• Use Centre and services to generate income</li> <li>• Capitalise on public interest in challenge events run by third parties</li> <li>• Build on the potential of corporate partnerships</li> <li>• Increase volunteer involvement and volunteer development</li> <li>• Develop range of professional and related partnerships</li> <li>• Crowd funding</li> <li>• Grow merchandise opportunities</li> <li>• Develop legacy giving</li> </ul>	<ul style="list-style-type: none"> <li>• Political uncertainty</li> <li>• Economic difficulties</li> <li>• NHS funding</li> <li>• Data protection change validated</li> <li>• Impact of events beyond how much raised is hard to measure</li> <li>• Fraud</li> </ul>



### 3 YEAR CORE AND SERVICE COSTS - 2018-19 TO 2020-21

### APPENDIX B

<b>Revive MS Support - 3 year core and service costs</b>			
<b>Area</b>	<b>Year 1 2018-19</b>	<b>Year 2 2019-20</b>	<b>Year 3 2020-21</b>
Core Costs (Operational and Overheads)	£309,940	£319,596	£324,183
Physiotherapy	£125,171	£128,926	£132,794
Outreach	£109,108	£112,381	£115,753
MS Nurse Support and Information	£56,822	£58,527	£60,282
Complementary Therapies	£53,574	£55,181	£56,837
HBO	£19,598	£20,186	£20,792
Counselling	£27,332	£28,152	£28,996
Other bought in services (eg podiatry/continence advice)	£5,000	£5,150	£5,305
Welfare & Benefits	£5,853	£6,029	£6,209
Groups and Classes (non physio led)	£5,500	£5,665	£5,835
<b>Total Budget (less developments)</b>	<b>£717,898</b>	<b>£739,792</b>	<b>£756,985</b>
<b>Revive MS Support - 3 year income secured/expected</b>			
<b>Area</b>	<b>Year 1 2018-19</b>	<b>Year 2 2019-20</b>	<b>Year 3 2020-21</b>
NHS Greater Glasgow & Clyde	£216,063	£213,063	£216,063
NHS Lanarkshire	£36,518	£36,518	£36,518
South Lanarkshire Council	£7,000	£7,000	£7,000
User Donations	£70,000	£80,000	£80,000
Biogen	£20,000	£20,000	£0
Sanofi	£20,000	£20,000	£0
NHS Endowment Fund	£22,292	£0	£0
RS Macdonald Charitable Trust	£15,000	£0	£0
Annual grants from Trusts & Foundations	£5,250	£5,250	£5,250
<b>Total income secured/expected</b>	<b>£412,123</b>	<b>£381,831</b>	<b>£344,831</b>
<b>Funding Gap to met by fundraising activity set out in strategy</b>	<b>£305,775</b>	<b>£357,961</b>	<b>£412,154</b>

**Amendments**

It is recognised that the objectives and actions may need to be changed as the Fundraising Strategy is developed. Changes agreed should be recorded below and incorporated into main document

<b>Item</b>	<b>Current Objective/Action</b>	<b>Change agreed</b>	<b>Date</b>