

YAS Charity Fundraising Strategy 2018 – 2021

Introduction

The purpose of this Fundraising Strategy is to guide the YAS Charity to carry out tasks in the most coordinated and effective way. It is to inform the planning of fundraising activities during this period. The fundraising strategy links our charitable activities with our fundraising activities as they can never be considered mutually exclusive.

A Fundraising Strategy would typically start with an evidence based review of the charity's current position, including reviewing donor profile. Unfortunately the YAS Charity has no information on past donors on which to place this assessment. As a result the methodology of this strategy is to look at our current position, our opportunities and challenges. This assessment has been used to inform a proposition of our way forward benchmarked against industry standard.

This strategy acknowledges that the YAS Charity has lacked direction and accepts that the YAS Trust has been considering in detail its approach to community engagement. The outcome of which may require us to revisit this strategy.

Brief coverage of YAS Charity Activities

To date the charity funds the following activities at an annual cost of c. £141,743K, including charity administration of c £54,506. This is the total sum of our financial commitments projected over the next 3 years.

	2017/18	2018/19	2019/20	2020/21
Salaries	£54,506	£56,927	£59,526	£62,820
Charitable Spend	£87,237	£88,228	£88,510	£88,795
Total Spend	£141,743	£145,155	£148,036	£151,616

The YAS Charity exists to support the work of the Yorkshire Ambulance Service NHS Trust.

The Charity current mission is:

Saving more lives across Yorkshire and The Humber, by enabling EVERYONE to respond in a medical emergency and to seek appropriate care, and by supporting those who respond to such emergencies.

We are achieving this by funding:

- Free First Aid Awareness Training
- Restart a Heart Day - CPR Training for secondary School Children
- Community Public Access Defibrillators – in partnership with local communities.
- YAS BASIC Volunteer Doctors
- Staff health and wellbeing projects.

Current sources of income

Based on 2016/17 the current split of undesignated income is:

Area of Fundraising	Amount	% of income
Community Fundraising	£1,918.14	3
*Defib programme (designated funding raised specifically for CPADS)	£26,637.59	46
Fundraising Events (Primary YAS Staff focused)	£9,326.52	16
Cash Donations - thank you to staff	£10,176.98	18
Interest from investments	£707.69	1
Legacy	£8,838.71	15
Total	£57,605.63	100

Future Plans

- In order to deliver the aims and objectives of the charity there needs to be a more sustainable and managed way to fundraise.
- The charity aims to be robust enough, in terms of both finance and governance, to make it independent of the YAS Trust.
- YAS has aspirations of including further activities within the charity which will require significant growth in fundraising.

Opportunities

A. Sign-posting:

- During the past 3 years the charity has seen a huge increase in the number of individual donations that have been made. We believe this is the result of the Fundraiser beginning to sign post funeral directors and solicitors to the charity. There is scope to develop and grow this practice.

B. Yorkshire:

- Yorkshire as a brand is hugely successful. Building the charity on the basis of that brand is key to our success. Our communities have an affiliation with Yorkshire and the resilience of Yorkshire people massively favour our charity.
- Although there are many competitors in the third sector with potentially a saturated market, there are very few regional wide Yorkshire charities – they tend to be more bespoke local organisations or large national players. Positioning the charity at the regional level will provide increased opportunities, including the potential for collaborations with organisations such as Welcome to Yorkshire and involvement in Yorkshire wide events such as the Tour de Yorkshire and the Yorkshire Show.

C. Staff and Volunteers:

- **People give to people** and we have an extensive network of YAS personnel right across Yorkshire. Our people are our biggest asset and this has to be seen as one of our biggest opportunities.
- The Trust's team of CFR Volunteers are already embedded in their local communities, the same communities we want to reach. These relationships need to include promotion of the charity and the fundraising ask.

D. Yorkshire Ambulance Service:

- Our biggest USP is that we are part of the ambulance service. We need the ambulance service to talk about us, to position the charity alongside the Trust and use the opportunities this presents to income generate.

E. Emotive Subject:

- In addition to giving to people there needs to be an emotive ask to draw support. The link with emergency healthcare, the ability to save a life and the notion of 'been there in the hour of need' needs to be harnessed.

F. Corporate Relationships:

- The Trust has many successful relationships with third parties, whether they be suppliers, customers, partners or advocates. This network needs to be used to the benefit of the charity.

Challenges:

- A. Within an already crowded charity market place we are also seeing the emergency, and growth, of our fellow NHS Charities.
- B. Distinguishing the charities position clearly from the work of YAS Trust itself, especially in relation to the projects we fund. The charity will not be able to fundraise for anything people believe is funded by the NHS. Even if they are things the NHS would like to do if we brand them NHS they will be presumed to be publicly funded.
- C. Legislative changes to data protection.
- D. Whilst having a regional remit is an opportunity, delivering charitable activities and fundraising across the region in a responsive manner is a challenge on resource.
- E. Employee morale and perception of the charity. We need to inspire our colleagues that the charity is the legacy of the exceptional care they provide and that the charity is part of what they do every day. Whilst employees are our biggest asset, harnessing benefit from that asset is a significant challenge.

Return on Investment:

The return on investment for our fundraising costs should be targeted at 1:3 which is industry standard. For each £1 raised 25p would be spent on fundraising. This is the overall average return on investment rather than for each specific action.

Fundraising is not possible in isolation of the profile of the charity. As a result individual activities may not themselves generate the 1:3 ratio but they should be an investment to raise the profile coverage of the charity to generate future support. Conversely, some fundraising income requires minimal investment to generate a high return, e.g. legacies. The 1:3 ratio is across both high and low return activities.

The charity will always incur administration costs; these are separate from fundraising costs. Administration costs are the costs associated with running the charity; managing our finances, servicing committee meetings, reporting to our Trustee, fulfilling NHS Trust requirements, spending the charity's money against our charitable objectives, managing staff and volunteers.

Currently we do not distinguish between these activities. The Charitable Fund Manager's role is currently around 80% administration and 20% fundraising. Prior to the Fund Manager role all administrative tasks were undertaken by the Fundraiser, which in turn restricted the capacity of the

Fundraiser to actually raise funds. While these administration costs will always exist we need to become more efficient and considerably lower our administrative burden.

Timescale

This strategy covers three financial years; 2018 -19, 2019-20 and 2020-21.

By the end of this period the charity will have:

Objective:	Addressing Opportunities	Addressing Challenges
Increased public awareness of the charity and its work	A, B, D	A, B, E
Established governance procedures which promote accountability and income generation whilst providing robust and effective leadership. This includes a refresh on the Charitable Fund Committee to include external expertise.	All	A, B
Reached a return on Fundraisers salaries and charity cost by the standard 3:1 ratio.	All	B, D, E
Have developed multiple income streams with a planned and considered approach: <ul style="list-style-type: none"> ○ Cash donations ○ Community Fundraising ○ Raffles and Lottery ○ Events 	A, B, C, D, E,	B,
Develop and grow a donor database to enable profiling and deliver a relationship management approach to fundraising. In addition using the database as a marketing tool within the requirements of data protection legislation.	B, C, D	C
Conduct an ongoing evaluation of work to develop the most effective methods of fundraising. This will inform our annual fundraising plan	All	All

The YAS charity will:

Objective:	Addressing Opportunities	Addressing Challenges
Provide clear sign posting for donations, deal with queries and acknowledge donations promptly.	A, B, D	A
Develop and support a network of volunteers to raise funds in their communities, including public collections and managing collection boxes.	B, C, D	A, D
Develop a legacy campaign to promote giving via wills.	A, B, E	
Develop corporate relationships to support fundraising activities through sponsorship, cash donations and gifts in kind.	B, F	A, B

<p>Hold a programme of events including:</p> <ul style="list-style-type: none"> ○ Hold an annual cash prize draw and develop a YAS Lottery. ○ Hold an annual programme of events for YAS Employees led by YAS Employees. ○ The charity will hold an annual team challenge event day. ○ The charity will lead an extraordinarily challenge with a team fronted by a member of YAS Leadership i.e. CEO, Chairman, Executive Directors. 	B,C,D, F	E
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In addition the charity will develop project specific sustainable fundraising plans to meet the needs of any specific projects/programmes that may arise. As an example, the current projects supported and potential associated fundraising plans are shown below:

Project	Commitment	Plan	Message
Restart a Heart	£20k p.a.	- Corporate sponsorship - School fundraising - Cash donations	- Position as a charitable activity rather than a Trust activity - Publicise the cost of the project as well as the benefits - Track and publicise numbers involved with link to charity - Promote any successes with link to charity
Free First Aid Training	£25k p.a.	- Corporate sponsorship - Grants - Community Engagement Activities - Cash donations from recipients - Cash donations from communities	- Position as a charitable activity rather than a Trust activity - Publicise the cost of the project as well as the benefits - Track and publicise numbers involved with link to charity - Promote any successes with link to charity
Community Defibrillation Programme	£40k p.a.	- Corporate sponsorship - Cash donations - Community fundraising via CFRs	- Publicise the cost of the project as well as the benefits - Track and publicise numbers involved with link to charity - Promote any successes with link to charity
YAS BASICS	£6k p.a.	- Corporate sponsorship - Specific events through network	- Develop a sponsorship package
Staff Support & Welfare Projects	Unknown	- Corporate sponsorship - Staff fundraising programme - One off public campaigns - Closer partnership with TASC	- Develop a robust offer to staff to get buy in - Needs to have an emotive external message

Increasing Profile and Coverage:

To meet our aims to increase profile and cash donations, coverage of the charity across Yorkshire needs to increase dramatically.

All fundraisers need to be proactive in their approach but also responsive to communities. This is very challenging for the existing Fundraiser in our current HQ centralised approach. This strategy proposes to meet the needs of the charity with the eventual development of Community Fundraiser roles.

The development of Community Fundraiser roles will begin as a pilot once the existing Fundraiser reach the 3:1 ratio of income to cost. Until then the Fundraiser role would work within the West Yorkshire Area, effectively fulfilling a Community Fundraiser role as a proof of concept. Whilst focussing on West Yorkshire, we will support other areas of Yorkshire on an ad hoc, as needed basis so these opportunities are not lost.

The Community Fundraiser Role:

- Would work with CFRs in their area to; assist with the recruitment of additional CFRs, assist with recruiting fundraising volunteers, and assist CFRs in their fundraising efforts.
- Would work at community events and organise more localised events and collections, for example supermarket collections, local public events such as summer fates, food festivals etc.
- Would be the local face of the organisation to promote the charities activities including engaging with localised media and social media platforms.
- Would target local shops, schools, clubs, community groups, rotary clubs, sports clubs, and meeting places.
- Would work with sports stadiums to hold CPR Days. For example, a team of CFRs around the perimeter of a football pitch with a co-ordinated CPR instructor on the PA system at half time would reach several thousand supporters. A bucket collection and co-ordinated marketing campaign would also take place.
- Would support the wider work for the fundraising team and bring in new contacts for corporate fundraising based on relationships harnessed at a local level.
- This would be a Band 4 role and each would have an income target initially of £100k per annum increasing to £150k.