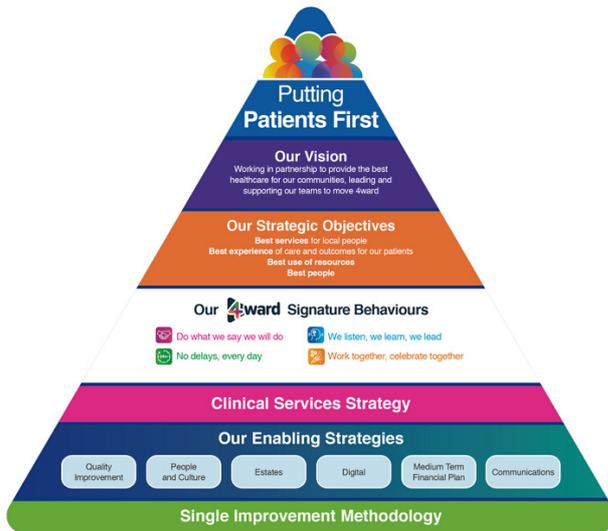


In April 2019 year the Trust board launched Putting Patients First, the vision and strategy for the next phase for the organisation. Putting Patients First is based on partnership. The Trust has developed this strategy and demonstrated their commitment to listen to and respond to their patients, staff and partners.

Between June and September 2019, they have:

- Engaged with clinical colleagues in 42 specialties and support specialties.
- Facilitated discussions between divisional leadership teams to discuss dependencies between services and our hospital sites
- Hosted a planning conference, attended by 70 partners from within the health and care system.
- Organised a 'market place' event attended by over 100 members of staff.
- Held an engagement event attended by more than 40 patients and patient representatives.



- Were more joined up
- Were easier for patients to access and find their way around
- Provided better support for choice, decision making, prevention and self-care
- Were as individual/responsive to a patient's needs as possible, taking account of any protected characteristics, social needs and demographic background

What patients and the public have told them so far;

When asked to describe what better services might look and feel like in the future there was consensus from our patients and public representatives about services which:



2.3 STRATEGIC PURPOSE

To provide structure and purpose to our fundraising plans and to reflect our commitment to the partnership with the Trust and Putting Patients First, the Charity has established a clear vision, mission and purpose.

This will underpin and provide clarity to our decision making processes and give us purpose, outcome and impact to our future fundraising appeals.



Charity Vision
 Putting the patient first in everything we do

Charity Mission
 Putting Patients First by supporting and improving the services of the Worcestershire Acute Hospitals NHS Trust

Charity Purpose
 We exist to support medical and health research, and to encourage excellence in healthcare for staff, patients and their carers, wholly or mainly through the services provided by Worcestershire Acute Hospitals NHS Trust

All funding provided by the charity is over and above core NHS services.
 None of your donation is used to replace core NHS services

2.4 CHARITY VALUES

The following set of Charity values will be our signature behaviours that we will adopt when working with the public, staff and supporters, to achieve our aims and objectives.

- We care about our patients, our supporters, our partners and our colleagues
- We consult, collaborate and challenge in our drive to deliver clinical excellence and exemplary patient care
- We act with dignity and humility, show respect, and consideration for others
- We achieve because we care and brave enough to ask questions of ourselves
- We recognise that new ideas, big and small, are essential for our future
- We embrace being a part of our community and enable our community to be part of us



To achieve long term sustainable success, clear strategic aims and objectives that have measurable outcomes and impact will be implemented.

Our strategy will be our roadmap over the next five years. Our fundraising programmes will be multi-faceted to avoid the over reliance on any one income stream or appeal. We will be open-minded about the means to get there and will continually test and adapt our initiatives, sharing what we learn.

We will develop supporting annual plans, which will describe our actions in key areas, including, new fundraising tools, development of new fundraising appeals, better use of digital and business intelligence, and continual support for the skills and knowledge of our people and culture.

To increase trust and support from the communities we will aim to be recognised for the impact of our work through the creation of a strong identity and demonstrating to our donors their donations represent value for money and are making a real tangible difference.

Our new Charity brand will give us a distinct that aims to inspire public trust and a sense of independence.

Through creating innovative campaigns we will build our reputation as one of Worcestershire's leading and much-loved charitable causes.

We will work with our staff, fund administrators and volunteers across all areas of the organisation, to feel valued, empowered, supported, included, and have a clear understanding of their role(s) and the importance they play in the success of the Charity.



We will become pro-active and adaptive to the wider changing environment that directly impacts on our work.

Strong financial management will lead to the most effective and proportionate use of charitable funds and we will monitor our costs closely to ensure they are reinvested appropriately.

The outcome will result in a sustainable integrated cohesive fundraising and communication model that provides direction and guidance to our charitable partners and fundraisers in a changing and competitive regional fundraising sector.

We will have a phased approach to developing new charity income platforms with our aim to gradually increase donations over the next five years in line with timed campaigns.

We will produce operational plans that have a 12-month view that will provide detail of the actions that we will take to implement our strategy within each year.



The charity strategic priorities are driven by our commitment to Putting Patients First, listen to and respond to our patients, staff and partners. The strategic plan is defined by our strategic priorities.

Each year an annual business plan will be agreed between the Trust Board and the Charity to provide coherence and measure towards achieving our strategic objectives.

Our priorities for fundraising and appeals will focus on where our outcome and impact can be put into action by the Trust. Therefore we will collaborate with the Trust and other relevant service providers and charities towards supporting the areas within the Trusts' developing Clinical Services Strategy.

- Urgent and Emergency Care
- Integrated Care
- Acute and Specialist Planned Care



Strategic Aims

1. Our charitable purpose and fundraising is aligned to our purpose, mission, vision and values in support of Worcestershire Acute Hospitals NHS Trust
2. Create a diverse, sustainable and innovative fundraising that is value for money and has clear impact on patients, staff, service users, carers and families
3. Our outcomes provide sustainable and flexible funding support that consistently improves the care for patients, staff, service users, carers and families.
4. Our purpose is aligned to the needs of our patients and staff in our communities, and our impact is communicated, recognised and acknowledged.
5. Embrace a culture of change that supports personal development, sustainability, learning, collaboration and good governance

Key Measures

- Our brand represents our core purpose
- Our communication is clear and transparent
- We deliver long term impact and outcome tracking
- Our fundraising continuously supports clinical excellence and exemplary patient care
- Income and expenditure is within each annual budget
- Our fundraising is multi-faceted
- We grow unrestricted donations
- Funded services and equipment are sustainable
- We create a diverse range of staff and patient engagement programmes
- We continually increase staff and patient engagement
- We are easily accessible for staff and patients
- Increase awareness of the impact on our patients
- Our appeals meet the required approval criteria
- We recognise staff and patients for their support
- Collaborate with the local voluntary sector and community service providers to benefit patients
- We encourage patient-facing volunteering
- We maintain confidence and trust with the public
- We governance is within the fundraising regulator guidelines

3.2 STRATEGIC PILLARS

We have identified four strategic charity pillars that provide the necessary focus for our future funding models.

These pillars will provide a platform and a balanced scorecard measure of how the methods used are performing towards achieving our aims.



- **Sustainable Fundraising** - Create new inspiring fundraising initiatives that provide long-term sustainability to meet our financial commitments. We will establish a new approach to fundraising that will be multi-faceted and sustainable to avoid the over reliance on any one income stream or appeal.
- **Clinical Support** - We will work with the Trust Divisional, Directorate and Specialist teams to identify and put plans in place to provide financial support through voluntary donations towards projects supporting within the Trusts' developing Clinical Services Strategy.
- **Effective Marketing & Communication** - To achieve stronger awareness we will communicate effectively to staff that we are there to help not hinder. We will aim to inspire public confidence and trust through demonstrating our impact is not replacing any existing NHS core services and build our reputation as one of Worcestershire's leading and much-loved charitable causes.
- **Creating the right culture** -. Our culture will aim to be an inspiring environment that staff, patients and the public can feel part of and identify with, that brings out the best in our people and our communities. We will listen to our people, encouraging genuine ownership and giving our people the creative space, trust and freedom to influence the culture and environment they work in.

4. IMPLEMENTING OUR STRATEGY

We have considered the challenges of an increasingly competitive charity sector and the diminishing income from traditional fundraising practices, as well as the fact that our fundraising is mainly restricted to within Worcestershire.

We have considered the challenges of an increasingly competitive charity sector and the diminishing income from traditional fundraising practices, as well as the fact that our fundraising is mainly restricted to within Worcestershire.

We will start by reconnecting with the communities where our support is used most and start to establish relationships with local organisations, councils, authorities, groups, societies, and clubs and continue to attend events to start to build awareness and our reputation.



Our approach to creating sustainable fundraising will initially focus on seven areas. We will also consider the selling of charity branded goods to support fundraising. These income streams will form the basis to our fundraising approach to deliver organic growth and sustainability. A summary of these income streams is provided below as we start to develop their alignment with the strategy.

Lottery & Regular Giving - To drive sustainable growth, we will focus on developing long term fundraising relationships with individual givers.

A society lottery fundraising model has successfully been run by hospices, air ambulances and national charities for many years as one of their core sustainable income streams. Usually directly sold to the public by an External Lottery Management company (ELM's) under strict gambling commission regulations, it has proven to have low attrition rates, high long-term retention rates and strong ROI that stabilises income, enabling charities to better plan for the future.

Lottery success is heavily reliant on the strength and awareness of the charity brand, and currently our brand is underdeveloped, therefore expectations for growth should be realistic over the next five years, however over the course of the strategy, lottery income is expected to be our largest unrestricted new income stream, contributing to in excess of 30% of all donations.

We will approach a number recognised External Lottery Management companies (ELM's) and work with them to provide a robust business case to the Charitable Fund Committee.

Grants & Trusts - To further develop on the back of limited success of our grant applications, we will identify key projects, infrastructure needs, and platforms within the Trust that are suited to specific grant foundations.

As some foundation funding is available within short windows, and we will work with the Trust Divisional, Directorate and Specialist teams to understand the short-term and medium priorities that could be part-funded through grant applications made by the charity that would otherwise not be funded through NHS core services.

We will also develop a new Grant Pack to provide these foundations with a selection of tangible items or ongoing programmes to fund.

We have assessed the current capacity and capability of the fundraising team and identified the need for a specialist resource to capitalise on new grant funding opportunities. The role will be on consultancy basis over a short-term period and regularly reviewed. The business case to support this post will be provided to the Charitable Funds Committee.

Community Giving - National charities are increasingly trying to reconnect with the local community, where traditional regional charities such as hospices and air ambulances continue to have great success, which is why it is essential for the Charity to be significantly proactive within Worcestershire.

With almost 50% of our population using our services each year and as the sole representative of the Trust hospitals serving Worcestershire, we are in an excellent position and have distinct reach and advantage over other local charities.

Using the existing relationships established through our Fundraising Officer, we will increase our presence at local events and provide increased opportunities for the public to touch, feel and experience the great work that we do.

The Fundraising Officer will be targeted to build these relationships, support general funds and specific appeals.

As part of the community giving programme we will also evaluate the cost benefit of expanding static collection tins location throughout the county. The business case to support this initiative will be provided to the Charitable Funds Committee.

Corporate Partnerships - The Charity currently has negligible Corporate Partnerships income. Strong corporate partnerships will be fundamental to the growth in donations.

We must recognise that Corporate Social Responsibility (CSR) is of growing importance to our future partners and it requires specific deliverables to meet business CSR requirements. In return corporate support will add tremendous high value incomes if managed effectively.

Initially an evaluation will take place of the Trust supply chain and approaches made with an aim to garner support for the Charity. The outline programme will include;

- Identify new regional businesses and organisations that have an affinity with the Trust
- Identify relevant business sectors to target
- Collaborate with local business networks
- Partnerships proposal to be no less than 2-5 years
- Create a new CSR impact measures for partners
- Create opportunities for businesses to provide sponsorship or match -funding
- Develop impact framework for partners to provide key milestones of success
- Record and promote success to secure further partnerships

Membership to the Worcestershire and Herefordshire Chamber and Institute of Directors will enable us to tap into new business networks and opportunities for engagement.

We will create a Corporate Partnership Pack as an engagement tool to better inform businesses of the associate benefits of partnering with us.

LinkedIn will be used as the primary platform to reach new and to develop existing relationships with businesses.

Charity Events - We will start to develop new fundraising events to enable greater engagement and to reach a mass audience, some community led and some specific to our B2B corporate partners funded through sponsorship.

The existing Staff Recognition Awards event ran by the Trust and supported by the Communications team will be adopted by the charity as a platform to support fundraising through sponsorship to underwrite some of the costs. We will initially approach the Trust supply chain for sponsorship and then expand out to new local businesses.

We will also identify external Worcestershire events for possible selection as the 'in aid of' charity. We will review and make recommendations for future charity led events based on a robust business case. We will also identify third-party events as potential partners, if they represent a low cost and low resource requirement, but have high impact and ROI.



Legacy Giving - The charity currently has negligible legacy income. This is compounded by not providing the public with any information on how to give or the impact that a 'Gift in a Will' can make?

Legacy giving for other locally based charities is up to 45% of their total income, built from historic work and significant public awareness. However, legacies are long-term with returns coming to fruition between 3- 5 years.

Initially a dedicated 'Gift in a Will' legacy page will be created on our charity website, providing relevant information. The campaign message will always be about the future and how your gift can impact on future care in the community.

- The new legacy plan will cover;
- Create a new campaign message
- Develop refined literature
- Evaluate existing supporter base
- Develop partnerships with regional solicitors
- Consistent communications
- Register with the Probate office (Smee & Ford)

In Memory Giving - In Memory giving is gifts given at funerals as opposed to flowers, if those were the wishes of the deceased.

The mechanism is usually managed through the Funeral Director. Through our community work the Fundraising Officer will develop stronger relationships with Funeral Directors and we will register the Charity on the In Memory Giving website that many solicitors use to distribute donations.

We will also work with the Bereavement Suite in WRH to support awareness of In Memory Giving for the charity.

Trading - To support with fundraising, supporters are keen to buy charity branded goods as well as donate. This helps raise money, keeps our supporters close to us and can help create awareness.

Branded goods are normally sold through a trading arm of a charity to enable the reclaim of VAT. At present it is not considered a priority to establish a trading arm until turnover increases.

Online and through static locations are the most successful ways to sell goods. Profit margin, timings and the range of goods is vital. To get the best margins requires a minimum volume purchase to get the right price.

Timing plays a crucial part when selling date sensitive goods, such as Christmas cards. We will work with the Finance team to look the best commercial options and develop supplier relationships to source the right goods at the right price subject to budgetary considerations.



4.2 CLINICAL SUPPORT

The Trust has identified four strategic clinical imperatives that provide necessary focus for our future models of care. They are cross - cutting themes that must be front and centre of their detailed planning and delivery.

The four clinical imperatives are: **Frailty, Access, Cancer and End of Life Care**. To support these imperatives, it has built three strategy pillars that support future plans within the local integrated care system:

<p>Developing and leading a comprehensive and responsive urgent and emergency care system</p>	<p>Empowering our teams to integrate services with primary care, community teams and other partners to deliver best care in the right setting</p>	<p>Operating our three hospital sites to maximum capacity and capability to deliver dependable, high quality acute and specialist planned care</p>
---	---	--

The Trust has committed to clear roles for our three hospital sites, will not close any of their existing three sites and each site will have its own unique service offer.

Worcestershire Royal Hospital will provide core services to the local population and more specialist care to a wider population across the county and beyond. There will also be a trauma unit for the county. Worcester will be our major acute site.

The Alexandra Hospital, Redditch will provide core services to the local population and a broad range of planned surgery for patients across the county. Our Redditch site will be a local hospital that provides specialist planned care.

Kidderminster Hospital and Treatment Centre will be our elective treatment centre for day case and short stay surgery and a centre for ambulatory specialities such as Endoscopy.

The charity will aim to model its fundraising proportionality and distribution of its limited resource to campaigns based on patients benefit at each site.

Our public appeals will be identified by the Trust and their Divisional, Directorate and Specialist teams advising the charity of medium and long term projects that need our support that otherwise would not be funded without full or in part charitable support.

A coordinated approach to care can only benefit the patients and staff we support. We will apply this across the Charity and the Divisional, Directorate and Specialist teams that are essential in supporting our work.

We will collaborate with GP's, CCG's, STP's, CQC, the local authority, and with the local voluntary sector and community organisations that support the delivery of care in Worcestershire.

We will also continue to support and collaborate with medical teams on appeals for special projects that directly improve the environment of our hospitals, where effective adjustments which can have enormous benefits to patients.



4.3 FUNDS & FUND MANAGEMENT

The charity aims to simplify its existing and future departmental administrated funds to be aligned with the charity purpose and the Trust major change programme and clinical imperatives.

Our aim is to have limited number of restricted appeals at any one time within each service, with each department having one fund administrator and one clinical lead coordinating.

Changes to departmental funds will be implemented over time to give reassurance to existing fund administrators that we will complement, not hinder, their existing good work.

New funds will be closely aligned with the clinical services strategy; however the current list of existing funds is not exhaustive and we will continually identify and close some existing funds that are not being used effectively, diverting these funds to other appeals that have greater patients and staff benefit.



4.4 EFFECTIVE MARKETING & COMMUNICATIONS

To achieve stronger awareness the Charity we will use various communications and marketing channels at our disposal, with the aim to demonstrate how we are impacting patients and staff and how donations are critical to making the difference. A summary of these channels is provided below.

Onsite Public Engagement - For the charity to build then maintain its awareness and engagement with the public, it needs to establish a permanent presence within the public access areas of our hospitals.

The creation of a Charity hub within the atrium of WRH run mainly by volunteers would provide consistency, creditability and trust with the public.

The hub will be a place to sign up volunteers, raise awareness of our campaigns, sell merchandise and generate unprovoked donations from the public.

Similar hubs could be set up within Kidderminster and Redditch Hospitals on a smaller scale, and ran in the same way. The business case to support this initiative will be provided to the Charitable Funds Committee.



Customer Relationship Management (CRM) - Building and maintaining relationships with new donors will be critical in developing sustainability. The relationship between different types of donors and the charity takes place through multiple touch-points and emotional triggers supporting the potential to engage with our supporters.

This is donor journey and mapping the donor journey is essential in analysing how our donors have been engaging to map the path they took from first contact, to where they are now, to retaining future support.

The use of GDPR compliant data collated through our CRM will be crucial in informing us of the right questions to ask the right donors at the right time, and aid us to establishing a donor funnel enabling us to better forecast financial information.

The Harlequin fundraising database will be a key tool in relationship management and development of community support groups and networks. One of the Charity's first steps will be to establish data entry protocols, procedures and proactive data management to build up a base of active and regular donors within the latest best practice and GDPR guidelines.

Brand and Identity - The public awareness and recognition of the work of the Charity is extremely weak with most parts of Worcestershire unaware that the charity exists.

The absence of a brand identity is being addressed through the new logo. A new online presence and visible consistent marketing materials throughout our hospitals will significantly contribute to addressing the need to raise awareness and give us an identity.

To further strengthen our reputation, make us more recognisable to the public and to grow consistent support for our fundraising, an annual communications and marketing plan will be developed supporting the fundraising annual plan.

We will start to make 'the ask' of the public visiting our hospitals through a campaigning to 'be a Hospital Hero' to inspire and provoke donations.

Social Media Channels - Digital and social media is clearly one of the most valuable and increasingly important ways to maximise marketing and fundraising opportunities for charities.

Social media will remain a key area for growth, but it should be vigilantly monitored through established analytics software to track any changes in trend and consumer and fundraising habits.

The Charity will establish its own social media channels, and work with the Communication team to support to target specific audiences with specific messages. No two channels are the same and attract different profiles of users.



4.4 EFFECTIVE MARKETING & COMMUNICATIONS

Charity Website - An interim independent charity website will be launched at the end of 2019 to establish a first point of contact for prospective donors, supporters, staff and patients to gain information about the charity, how to get involved and how they can donate.

The next phase of the Charity website will follow after extensive market research, and will be designed to better reflect our user habits, be flexible and fundraising friendly. It will include a donation hosted portal that directs donors to general appeals in the first instance, but as not to mislead donors, they will be able to donate to specific appeals as a one off or a regular monthly donation. our registered domain name is www.wahcharity.org



Marketing Materials - Our marketing materials and literature must be consistent across all media channels in its messaging and layout and build on the strength of our storytelling.

Our messages will be visually emotive and provocative enough to attract a positive response. Our messaging will be relatable and relevant to each campaign that will reflect the way our staff, patients and communities see themselves, and how the outcome of the 'ask' will make an impact.

We will demonstrate through our marketing and communication information that the charity is credible and donations are being used appropriately to fund its purpose.

We will review all current literature and images to ensure all future messaging is as recognisable as our own. We will closely monitor the viability of more traditional marketing platforms such as direct mail as donor tolerance changes.

Internal Platforms - To establish the Charity in the forefront of Trust new starters we will work with the Communication team to ensure a charity section is included in the new starter induction programme.

Our aim will be to ensure charity is first and foremost in the minds of new Trust staff if they desire to support a cause that is close to them, and can directly impact their jobs and their patients.

A new presentation will be created with all the most relevant information on how to work with us and how we can support new starters in their future fundraising.

To ensure the charity keeps Trust staff updated with initiatives, progress on appeals and ways to support live appeals, we will provide a charity news page in Worcestershire Weekly and Worcestershire Way.

We will create our own dedicated page on the Trust intranet site as the 'go to' location for staff for Charity point of contacts, processes to set up a fund and fundraising advice and support.



Volunteers - The charity will need reliable and enthusiastic volunteers to get involved in a wide range of different and exciting events as it grows.

Volunteering is vital for the charity to build relationship with its community, support fundraising and build loyalty.

We will review current policies and develop a volunteer handbook and provide our volunteers with marketing materials and tools to support their role.

To grow our network of volunteers we will work closely with the existing Patient Participation Groups, Royal Voluntary Service, Patient Experience Teams and existing voluntary groups such as the League of Friends to create new ways to provide rewarding support for the charity.

Ambassadors and Patrons - We will work to develop new partnerships to secure the goodwill and support of high-profile Charity Ambassadors from the world of media, sport and entertainment within Worcestershire or have a connection to the county.

This platform is important in building brand loyalty, engagement and awareness of our cause and has proven to add significant value to Charity events.

