Multiple Sclerosis Society

Board of Trustees

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Open

Title of paper:

BD.2011.03.10.E
DRAFT Fundraising Strategy 2011-2015

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Issue:

The MS Society strategy has been revised to cover the period from 2011-2015. In light of this and the arrival of a new director, the fundraising strategy has been reviewed and refreshed.

Recommendations:

The Board is recommended to:

- note this paper and appendices 1 and 2
  - Appendix 1 – the Draft Fundraising Strategy
  - Appendix 2 – the Draft Fundraising risk log

Background:

The Fundraising strategy "Funding our strategy, putting the pieces together to beat MS, 2009-2012" was submitted to the board for their December meeting in 2008. This has been implemented to date across the society. With changes in the external environment, a refreshing of the organisational strategy and the arrival of a new director, this strategy was due for refreshing also.

To develop this strategy, much information has been collated. As part of my induction, fundraising staff across all four nations, directors, trustees, council members and several service delivery staff gave their views of our fundraising potential. At a volunteer open day nearly 30 branch members, many with MS, discussed what works and doesn't work for MS Society messages and fundraising.

Most importantly, a true cost review of our existing products across all four nations was conducted by the fundraising leads from Scotland, Wales, Northern Ireland and MSNC. This demonstrated the range of activities undertaken, and detailed their respective returns on investment. This was compared with the sector average and an assessment made of growth potential.

This strategy (listed in **Appendix 1**) has been discussed with all fundraising teams and has EG approval. A draft fundraising risk log is attached in **Appendix 2**

Details:

Much has been achieved since writing of the fundraising strategy for 2009-2013. The new strategy builds on these achievements within fundraising and across the organisation. It considers growth potential from where we are today.

Pages 1-8 are the overarching aspects of the strategy – ways of working, vision, financial targets etc. Thereafter the strategy identifies key objectives for each of our fundraising areas to be implemented UK-wide, including branches. These are in draft form for teams to own and take forward so tiny details may change.

The main issues for the Board to note are as follows:

1. Whole Society Fundraising. In order to reach our objective targets there will be implications across all areas of the Society. Issues or decisions taken across the Society have an impact on our brand and our ability to fundraise. It is important we all become aware of how these issues/decisions impact on our fundraising potential.

2. Good processes and measures. We need to establish our performance indicators, processes and systems to manage fundraising activities and staff. We need to establish a restricted donations protocol (with respect to

branches and nations as well as specific project work).

3. Innovation and risk. We will need to try new ways of fundraising to enhance our portfolio of activities. This will include taking some measured risk. Areas in which we need to innovate within fundraising specifically include further mass participation events, new channels for direct marketing (online, text, TV), strategic corporate partnerships and major gifts. I believe we should also consider again the subject of commercial partnerships with developers of drugs and medical aids which will be of benefit to people with MS. Other charities are have year on year sustainable income from this.

4. Stewardship of donors and relationship management. Individuals who support our fundraising and/or make large donations will need to be managed with a fundraising target in mind. This is happening but it will be more important to consider all these relationships (trusts, Pharmas, high profile supporters, high net worth individuals, volunteers) in light of their giving relationship.

5. Legal and regulatory framework. This is easier to manage across MSNC and our nation offices, but is less easy with our current structure to address across branches. There will be a priority to manage our risk in this area.

Branding, Marketing, Membership, 2013 Anniversary and Structure

The strategy does not address branding, marketing, membership or structure issues. However, these are linked with the fundraising strategy.

1. Branding – as agreed at Executive Group, we need to have a greater focus on living the brand across the organisation, including branches.
2. Marketing – currently there is no marketing budget so 2011 will be used to develop a marketing strategy and plan in order to budget in 2012 appropriately.
3. Membership – a membership strategy will need to be updated to enable us to review our membership product so it is current and fit for purpose.
4. 2013 Anniversary – to make the most of the anniversary year, Executive Group have agreed to a programme looking back 60 years, celebrating what we have achieved and looking forward to what is possible in the next 60 years

To deliver these activities, it may be necessary to make structural changes. These will be considered within appropriate business planning, costing and HR processes.

BD.2011.03.10.E
APPENDIX 1

- DRAFT -

Funding our strategy

Putting the pieces together

TO BEAT MS

2011 to 2015

Introduction

In 2010 the MS Society spent time refreshing the organisational strategy to ensure it is fit for purpose from 2011 – 2015. In light of this the fundraising strategy has been reviewed. The review took account of the changes to the economic environment external to the Society and the internal changes that have been made.

The MS Society Strategy outlines our five key aims in relation to:

- research
- information
- support
- raising standards of care
- leading the agenda

In the early stages of the organisational strategy, the MS Society intentionally invested reserves to fund these activities. These reserves now rest around the recommended level, so any future expenditure can only be paid for by fundraised income. The organisation therefore relies on fundraised income and this will change the way the organisation relates to its fundraising activities.

In fundraising our priority will be to deliver our portfolio UK-wide and across a range of activities. This must include investment in legacy marketing since this is the cornerstone of our net income and largely unsupported. There is growth potential in partnership fundraising where we will focus effort on major gifts from individuals and companies, and on appropriate relationship management (stewardship).

The community & events fundraising activities across the UK deliver us a core of income and media potential. This is a key area for MS Society as it will drive the community fundraising, liaise to maximise branch fundraising and deliver leads for legacy income. For this reason we will continue to invest here growing our portfolio of local fundraising, community events and working UK-wide.

Fundraising at branches is largely dependent on the quality and quantity of volunteers and we will use the outcome of the Fundraising Development Pilot to consolidate and grow the income raised in the local area for local needs. In addition, it is imperative that branches understand the important role they play in funding national priorities and this communication must be a key part of our organisational strategy.

The direct marketing activity raises our profile with targeted donors and ensures that we have a database of supporters who have the potential to grow into legators, event attendees and campaigners. It is therefore imperative that we continue to grow the database of supporters and cross-sell products. This rate of growth will be fully dependent on the investment put in – and we would expect to invest more as and when the market responds positively to our recruitment communications. Donor research and testing new messages and communication channels are needed to increase return on investment at point of recruitment.

In 2013, the Society will celebrate our 60th Anniversary. With appropriate messaging this will enable us to engage with people affected by MS across the UK – marking the development of services and research in the last 60 years, celebrating the contribution of volunteers and the achievement of people with MS, reengaging those who have lost friends and family, and setting out our goals (that need funding) for the next 60 years and until there is a cure.

Scope of the strategy

This Fundraising strategy covers the period 2011 to 2015. It includes all fundraising activities of the MS Society: national centres, branches, support groups and UK-wide activities. It does not refer to membership or marketing. Although these are important factors in supporting our fundraising plans, they are yet to be reviewed and refreshed so the assumption is that these will be as effective as now – or better.

Mission and ambition

The MS Society mission is 'to beat MS'. Many of our supporters and members know that we will do this through scientific research into the causes and treatments for MS and its symptoms. We are on the cusp of some extraordinary developments in this research and we must remain focused and ambitious on this goal. In the meantime, we support all those affected by MS and we must be clear in how we deliver our support so that we can be clear in our fundraising ask.

How we developed the strategy

A new fundraising director was briefed to review and refresh the strategy. As part of her induction, fundraising staff, directors, trustees, council members and several service delivery staff gave their views of our fundraising potential. At a volunteer open day nearly 30 branch committee members, many with MS, discussed what works and doesn't work for MS Society messages and fundraising.

Most importantly, a true cost review of our existing products across all 4 nations was conducted by the fundraising leads from Scotland, Wales, Northern Ireland and MSNC. This demonstrated the range of activities undertaken, and detailed their respective returns on investment. This was compared with the sector average and an assessment made of the growth potential.

This strategy has been discussed within all fundraising teams and EG for approval.

How we will work

To ensure we are working to our maximum potential, this strategy is to be implemented across the <u>whole Society</u>. Each fundraising lead will work with other leads (in fundraising and across the organisation) to ensure we deliver the best possible fundraising programme. This will include learning together and sharing resources. The differences in nation priorities will be detailed in operational plans.

As fundraisers our primary 'key performance indicator' is, inevitably, net income. However to work UK-wide we will need to work on different performance indicators for the management of activities and the management of staff. Therefore establishment of <u>good processes and measures</u> will be imperative in our fundraising planning. It is also important that we have the right financial processes for measuring income against products, audiences, staff teams and where restricted against expenditure budgets.

During this period MS Society fundraising must continue to <u>develop through innovation</u> and new opportunities. This means keeping abreast of innovation within the sector

and across our own teams. It means taking measured risks with fundraising investment. Of particular note will be our 60th Anniversary in 2013 which will allow us opportunity to develop new fundraising activities and streams. Most likely this will include an anniversary appeal.

We will focus on our stewardship of donors and relationship management. This will be across the organisation and it is important that the drive for these relationships is understood from a fundraising perspective. This will be especially true for trusts, high value supporters, corporates (including pharmaceuticals), volunteer fundraisers, and major donors. To do this, we will establish relationship managers who are responsible for the development of the relationship and through whom all activities must be coordinated.

The legal and regulatory framework for fundraising is constantly changing. We will work together to ensure we are fully aware of changes to regulations and to best practice within fundraising. We will take responsibility for sharing this across the organisation and with our branches.

Principles of working

In seeking to increase our fundraised income, we will:

- Put donors and supporters first in our management of activities and resources to maximise net income
- Be early adopters of new technologies and fundraising initiatives
- Work in an open and collaborative style, sharing information and experience with colleagues
- Continue to consider return on investment as one indicator of success, seeking to keep costs down, while acknowledging the need to invest for the longer term
- Coordinate activities UK-wide whilst acknowledging the need sometimes to recognise the differences between the four nations
- Support and recognise the achievements of our hugely committed volunteer workforce alongside our staff
- Work with colleagues, volunteers and people affected by MS to ensure that we maximise income potential
- Meet or exceed all statutory and regulatory obligations

Key dependencies

Fundraising staff can never work successfully in isolation. We receive high levels of support from staff across the organisation in a variety of ways. For example fronting appeals, supporting events, introducing useful contacts etc.

To continue the growth in income that our strategy necessitates we will require this level of co-operation and more. We must acknowledge that other departments' activities and decisions taken throughout the organisation impact on our ability to fundraise. The next level of integration requires that we are fully aware of the impact of organisational decisions on our fundraising potential. This is particularly true when dealing with communications, service delivery, external stakeholders, messages and relationships.

This is an obvious dependency with marketing, branding and membership. These will be reviewed and refreshed to maximise their value to the Society and will underpin our fundraising messages.

A case for support to inform donors must be based on three things – clearly expressed need, clearly defined outcomes for people with MS and clear cost base. It is imperative that the MS Society articulates all three. A greater emphasis and change of business practice across the Society will be required to demonstrate outcomes, particularly to grow restricted income and income from grant giving organisations.

Involving people with MS

The involvement of people with MS in all core activities of the Society is fundamental to the way we operate. In 2010, volunteer fundraisers (many with MS) generated some £6m into the branches, supporting a vast amount of service delivery.

In addition, volunteers including people affected by MS are engaged in national fundraising initiatives. For further involvement we plan to form a fundraising reference group of people affected by MS and, in the meantime, we work with councils, trustees and local fundraisers.

Economic circumstances

The economic circumstances have changed in the last 3 years, and fundraising at MS Society has been impacted. On a positive note, where other charities are still planning up to 20% further drop in income for 2011 onwards, MS Society has been able to weather this impact through careful planning, forecasting and management.

Legacy income has been reduced by around 15% due to the lower stock prices and the slow movement of the housing market. Trusts have decreased some of their giving since their portfolios are not generating as much income for distribution. Trust fundraising has become more competitive and will become even more so as local authority grants are removed and smaller organisations turn to trust or foundation grants to plug the gaps.

Community and sponsored events have continued to grow in number and participation, but average values raised have fallen. Corporate and employee fundraising continues to be a stable area for income generation and the MS Society has potential in this area as our baseline is low.

It is in new donor recruitment that we have been impacted the most. Across the sector it appears that people continue to give to their existing charities, but are not taking on new causes as willingly as they have done in previous years and are not increasing their gifts. MS Society invested in new donor acquisition but we have not seen the growth in our individual giving as predicted. To maximise individual donor giving in the future, we must focus on those people who have a particular affiliation to MS and are already known to us. We must also be more imaginative in selling our proposition.

These trends are seen across the sector with legacies predicting to rise as house prices do and with individuals continuing their charitable commitments but being cautious about extending their giving.

Where do we want to be in five years' time?

When a supporter comes to the Society they are confident that the money they give or raise will be used wisely to beat MS. They understand the vision of the Society and their role in delivering that. They build their commitment to the Society through appropriate communications. Year on year, they understand more about the success of the Society and they commit to the Society more. They know that their data will be managed appropriately and protected from misuse.

The MS Society has confidence it will raise enough funds to deliver all planned work year on year across a five year planning cycle. This relies on a balanced portfolio and good knowledge of the risks associated with each income generating stream.

Every staff member in the Society understands their role in raising these funds and is supportive of the process. Priorities for service delivery, communication, research and infrastructure are discussed with fundraising as soon as they are a germ of an idea to understand any positive or negative impact on fundraising.

The four national offices and 300+ branches collaborate fully on projects and donor stewardship, actively seeking ways to broaden involvement, increase income and keep costs to a minimum.

To do this we support volunteer led income generation across the UK. We have an active base of trained, well organised and highly motivated volunteer fundraisers. We have a thorough knowledge of our supporter base and our members. As a result we communicate with them appropriately, making full use of available technology.

As the backbone of our fundraising, we have a varied and sustainable portfolio of fundraising activities delivered by a committed, experienced and motivated fundraising team. We fully evaluate all fundraising activities and have detailed and accurate information on income raised throughout the organisation from branch to national level. We take every opportunity to 'cross sell' between our members and donors, increasing the engagement and involvement of our supporter base. We use our resources effectively at local and national levels, avoiding duplication of effort and expenditure.

Having celebrated more than 60 years of operation, the MS Society is financially stable and looking forward to a time, within the next 60 years, when we will have beaten MS.

This is the vision of the fundraising strategy to be implemented by MS Society.

Ultimately where we want and need to be by 2015 is raising significantly greater income and, based on what we know now, this is our projection based on income type across the organisation not by geography or department. These figures will be subject to review on an annual basis and rely on clear need across the Society.

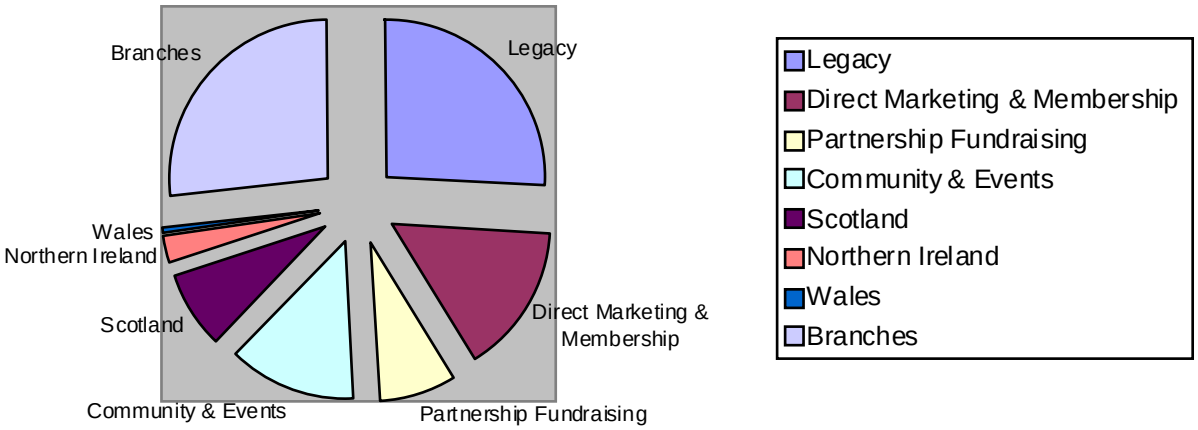
	2008 budget	2012 projection from 2008	2010 year end forecast	2015 projection
Income				
Income into branches (incl. branch legacies)	6,000	8,000	6,700	8,500
Events	1,950	2,730	1,313	2,200
Community	1,418	2,552	2,363	3,500
Subtotal from the community	9,368	13,282	10,376	14,200
Direct marketing	4,375	7,500	4,232	6,000
Corporate fundraising	450	1,000	706	2,000
Grant giving institutions	600	1,200	729	1,000
Major donors	10	350	419	1,000
Other (incl. trading)	107	150	340	400
Legacy income	9,270	11,000	7,027	9,500
Total fundraised income	**24,180**	**34,482**	**23,829**	**34,100**
Expenditure				
Branch fundraising support			144	400
Events	785	942	546	730
Community	330	500	500	875
Direct marketing	1,641	2,500	1,254	2,250
Corporate fundraising	100	250	157	375
Grant giving institutions	81	135	128	150
Major donors	59	110	124	330
Other (incl. trading)	0	0	200	200
Legacy income	185	250	123	500
Central support costs	249	340	465	450
Total expenditure	**3,430**	**5,027**	**3,641**	**6,260**
Total net income	**20,750**	**29,455**	**20,188**	**27,840**

This excludes any income received from new trading partnerships (for example: bringing new products/services for people with MS to market)

Fundraising activities

It is important for the MS Society to have a balanced portfolio so that we are not greatly at risk. The following chart (of year end forecast for 2010 by department) demonstrates that branches and legacies deliver around one quarter each of our fundraised income – and yet these are the two areas with least management resources and least investment. Our fundraising operational plans must address the support given to deliver this income.

2010 year end forecast



<u>Challenges for 2011</u>
Direct Marketing and Community & Events continue to deliver a solid income level but new ways of reaching our audiences must be used to enable greater efficiencies. Partnership Fundraising continues to be an area in which MS Society has potential to grow.

In the nations, the Scotland fundraising team has been recruited during 2010 and there will be a challenge to ensure income is achieved as the team re-establishes itself and its product portfolio, particularly after respite care changes.

In Wales the limited resources of one fundraiser need to be used effectively to drive up gross income. In Northern Ireland, the geography and close knit communities ensure good response to activities, but may also ultimately limit the income achievable.

Therefore, in order to deliver this strategy UK-wide, we will need to work together in different ways during 2011 and onwards. To do this we will need to manage our targets and measures differently to account for the teamwork and co-operation.

Fundraising Strategy

Key Achievements to date:

1. UK-wide fundraising meetings happen to share ideas and plans across different fundraising activities
2. We have established the Partnership Fundraising team with good development of our corporate and trust fundraising areas
3. Our community and events team and nation fundraisers have taken advantage of the resurgence in this area of fundraising across the UK
4. All the lead fundraising posts at MSNC and across the nations are filled with experienced fundraisers
5. All donors are on one database used by fundraisers at all four nation offices.

We will:

- Deliver this fundraising strategy and implement it UK-wide
- Engage across the organisation so all staff and volunteers understand their roles in delivering our fundraised income
- Ensure all donors develop positive relationships with the Society and reach their maximum giving potential
- Establish good processes and measures so our activities deliver against objectives and ensure our activities conform to the highest standard of regulation
- Invest in new ideas and innovation, continually scanning the external environment
- Invest in our fundraising team UK-wide so that our staff are expert, engaged and inspiring

Our core objectives:

- Grow gross income to receive a minimum of £34.1m per annum (pa) by 2015
- Plan our work as one team and deliver our individual department's objectives
- Plan and implement legacy marketing strategy across the organisation
- Plan and implement our 2013 celebrations and appeal
- Implement a programme across the Society to steward all our donors appropriately
- Work with branches so they are engaged in fundraising for national priorities and are delivering their local activities legally, safely and on brand
- Deliver and work within a framework for setting targets for activities, staff and teams which maximises the income to the organisation
- To ensure all posts are filled and all staff have clear objectives and strong management

Measuring our achievement:

- increasing levels of income across the Society
- securing more long-term commitments, allowing us to better predict future income
- raise funds in the most cost-effective manner, operating at a minimum 5:1 return on investment (ROI) across the portfolio
- HR indices (i.e. 121 notes, percentage of posts filled, days of sick leave, percentage of development plans implemented)

Details of achievements and objectives by fundraising specialism follow. Any difference for planning for nation fundraisers or branches is outlined within each fundraising specialism.

Major gift fundraising

Definition:
Major donors are individuals capable of making significant gifts. Where the primary relationship is with the individual supporter (rather than a trust or company) they will be included in a major gift programme.

Key Achievements to date:
1. From our existing supporters and contacts, we have identified individuals who have the potential to make major gifts but have not yet done so.
2. We have begun to scope out committee led fundraising activities drawing together like-minded individuals.

We will:
- Continue a programme to identify potential major donors, from the database and contacts across the society, including branches.
- Position ourselves as the charity of choice for major donors with a particular interest in MS through events and marketing.
- Achieve step-change through investment in resources to manage key relationships and 2013 celebrations.
- Establish a development board of individuals who will help us solicit further gifts from their peers

Our core objectives:
- grow income to receive a minimum of £1.0m per annum (pa) by 2015
- engage major donor prospects using varied, relevant and inspirational means
- steward all major donors efficiently, effectively and appropriately using key staff across the Society
- develop a recognition programme that rewards commitment and encourages increased giving and support
- develop a major gift strategy around the 2013 anniversary celebrations
- by 2015 to have established a process by which individuals identified throughout the UK (including branches) will be appropriately stewarded for major gifts

Measuring our achievement:
- increasing levels of income (cash and pledged income)
- securing more long-term commitments, allowing us to better predict future income
- raise funds in the most cost-effective manner, operating at a minimum 3:1 return on investment (ROI)
- volume and value of ‘asks’ made including repeat or increased gifts
- volume of face to face contacts

UK-wide activity:
Individual major donors will be best managed wherever works best for each individual – but always with a view to maximising the relationship to the MS Society as a whole and to giving in budget or restricted income gifts.

Trusts and statutory

Definition:
Grant giving institutions are organisations that exist – or have specifically created a sub-section of themselves – to awards grants against set criteria. Grant giving institutions have varying breadth of criteria and come in different forms. This area of fundraising includes trusts, foundations and settlements established through private or corporate wealth, as well as statutory bodies. This income is mostly restricted and applications require substantial evidence of outcomes to be highly effective.

Key Achievements to date:
1. We have established a programme of asks for smaller grant giving bodies thus enabling us to invest time in more complex and higher value approaches.
2. We have established processes for managing key relationships using various staff.

We will:
- Manage our relationships to a high standard; growing our reputation as a charity to work with and encouraging longer-term partnerships.
- Be thorough and creative in broadening the packaging of the work available for funding, reflecting the wider nature of the Society's activities.
- Become a charity of choice for funders focusing on the Society's key areas.
- Increase effectiveness in high value application through evidencing outcomes.

Our core objectives:
- raise increasing levels of income leading to a minimum of £1.0m pa by 2015
- focus on larger donations to grow the total number of donations
- stay abreast of developments in the marketplace and ensure that we are well placed to take advantage of opportunities (such as new funds) in a timely fashion
- stay abreast of developments in the Society and ensure we are well placed to take advantage of opportunities in a timely fashion
- ensure that we understand application criteria and requirements of funding to meet our funders' needs
- steward our donors efficiently and effectively by managing the donors and our internal stakeholders

Measuring our achievement:
- increasing levels of income (cash and pledged income) and average value of gifts
- securing more long-term commitments, allowing us to better predict future income
- raise funds in the most cost efficient manner, operating at a minimum 6:1 ROI
- volume and value of 'asks' made
- feedback – internal and external

UK-wide activity:
Organisations with a UK funding remit will be managed at a UK level. Organisations with a remit of giving to more local applications may be approached by local fundraisers, with support from their respective national offices.

Corporate partnerships

Definition:
Corporate support for the MS Society can be financial, or time made available for employees to volunteer. Corporate support can refer to a one-off donation; to a long-term, mutually beneficial, multi-faceted strategic partnership, or anywhere in-between.

Key Achievements to date:
1. We have resourced the corporate team with appropriate staff in number and experience.
2. We have delivered a multi-year partnership with EDF Energy.

We will:
- Diversify our business streams to include a focus on strategic partnerships underpinned by profile-raising charity of the year partnerships.
- Manage our relationships to a high standard; growing our reputation as a desirable charity to work with and encouraging longer-term partnerships.
- Develop a rolling new business programme that reflects the necessary long lead times.
- Develop our relationships with key pharmaceutical companies into systematic, structured and strategic partnerships. These partnerships will be managed ethically, taking care not to compromise the MS Society's independence.
- Develop approaches for corporates with an interest in MS and people with MS

Our core objectives:
- generate a minimum of £2.0m pa by 2015
- maximise opportunities by employing different corporate fundraising techniques to best effect across key targeted companies
- identify tangible packages for corporate funders to support and tangible ways to include branches in delivery of partnerships
- add to our income streams with mechanisms which play to our organisational strengths
- develop and apply tools, policies and procedures to ensure we work effectively and efficiently

Measuring our achievement:
- increasing levels of income (cash and pledged income)
- raise funds in the most cost-effective manner, operating at a minimum 4:1 ROI
- development of new business streams
- repeat, multi-year or increased gifts
- relationship management and stewardship
- feedback – internal and external

UK-wide activity:
It is often important to work with companies where they have their places of operation, which often necessitates representation across the UK on the ground. This will be delivered through partnership working UK-wide.

High profile supporters

Definition:
High profile support is beneficial to the MS Society through enhancing awareness and adding value to a range of activities. High profile supporters can generate income directly, or can add value through association.

Key Achievements to date:
1. We have managed current high profile supporters to deliver income through association (e.g. the endorsement of the Hairy Bikers for Cake Break delivered a hike in income in one year).
2. We have worked with high profile supporters to add value to people affected by MS (e.g. Oritse Williams meet and greet with young carers).
3. Supported professional golfer Tony Johnstone in a high profile Pro-Am golf tournament in aid of the MS Society which generated in excess of £100k.

We will:
- Develop a core group of high profile supporters with whom we work, focused on our messages, our activities or our audiences.
- Ensure that we are the charity of choice for high profile individuals affected by MS.

Our core objectives:
- grow our numbers of high profile supporters so we have representation for all necessary organisational messages and activities
- proactively cultivate long-term relationships with high profile supporters
- cultivate relationships with key agents and representatives
- steward high profile supporters, ensuring they understand the value of their support

Measuring our achievement:
- increasing the number of high profile supporters
- Increasing number of activities enhanced by association with high profile supporter
- range of high profile supporters is diverse and appropriate to different activities
- feedback and evaluate our relationships with individual high profile supporters

UK-wide activity:
For a consistent service, all high profile supporters will be account managed through the major gifts team – although different key staff may be lead contacts with each supporter as is appropriate.

Events and community fundraising

Definition:
Raising funds through organised events and activities across the UK, e.g. London Marathon, overseas challenge, parachuting, Ben Nevis. Individuals and groups of supporters may raise funds for the Society by organising their own fundraising activity.

Key Achievements to date:
1. Activity evaluation and planning has been completed by fundraising staff UK-wide.
2. Key supplier relationships mean we have priority listing on several event websites.
3. Introduction of events as they come to market positions us at forefront of sector.
4. NetCommunity has improved data collection and management.
5. MS Society online shop, tribute funds and celebration giving have been launched.

We will:
- Generate a minimum of £5.7m per annum by 2015 across the UK
- Maximise the number of participants onto a varied portfolio of activities
- Maximise the number of volunteer fundraisers and fundraising groups
- Ensure excellent rates of retention, repeat giving and average gift
- Effectively use the portfolio of activity and a broad range of marketing techniques to attract new supporters.

Our core objectives:
- Develop a portfolio of activities and products UK-wide, which are well supported, show an excellent return on investment and have a positive impact on income.
- Steward fundraisers appropriately either by geography or by event; providing high quality communications, excellent customer service, and effective recognition
- Make good use of technology to improve the quality of supporter data, communications and sponsorship
- Test, evaluate and embed marketing channels and messages for better targeting
- Develop excellent working relationships with key third party agencies
- Develop initiatives to have four successful annual community products by 2015
- Increase tribute fund giving as a focus of 2013 anniversary celebrations
- Develop and deliver guidelines, tools and products so that funds are raised honestly and in the most economical way re: cost and supporter time
- To be recognised as the leading charity in accessible fundraising events
- Increase uptake of Gift Aid on donations and sponsorship

Measuring our achievement:
- increasing levels of income including increased average gift values and % gift aid
- raise funds in the most cost-effective manner, operating at a minimum 3.5:1 ROI
- increasing repeat, multi-year and new supporters
- relationship management and stewardship of fundraisers
- feedback from internal and external sources

UK-wide activity:
This community and events fundraising strategy relates to the whole of the UK. Fundraising activities and participants will be managed appropriately across the society. Community fundraisers will be managed where most applicable.

Income into branches and support groups

Definition:
Branches and support groups raise income through volunteer-led activities, using community fundraising techniques. Some branches receive legacies and a small number run charity shops. In 2010 the branches raised £6.2m of which approximately £0.5m was earmarked into the national centres for specific purposes.

Key Achievements to date:
1. Branches are aware that reserves must be at the recommended level of one year. Excess reserves are to be spent for the benefit of people affected by MS.
2. For any local legacy, branches must demonstrate a business plan which answers the local need and is of benefit to people affected by MS.
3. Branches have a significant support structure since the introduction of Area Teams, although focus has been primarily on fire fighting and compliance.
4. A fundraising development pilot to support branch fundraising was established.

We will:
- Generate a minimum of £8.5m per annum by 2015 across the UK (incl. legacies)
- Provide effective support to enable branches to maximise donations to the society
- Raise donations through branches and support groups for nationally organised expenditure (i.e. research, information, campaigning)
- Increase the number of volunteer fundraisers and fundraising groups
- Develop a united and flexible funding culture to ensure funds raised are effectively used to support people with MS

Our core objectives:
- Ensure branches understand their role in delivering overall MS Society objectives by proactively uniting branches, support groups and national centres so that
  - ◊ a flexible funding model is promoted and valued
  - ◊ income is maximised across the organisation
  - ◊ proven fundraising products are widely used throughout the organisation
- Roll out a fundraising development programme, implementing lessons from pilot
- Proactively recruit, support and develop volunteer fundraisers (as individuals or groups) and motivate them to maximise the income from their time and activities
- Enable volunteers to fundraise together, sharing skills and experience. By 2015, to have 50 volunteer ‘fundraising champions’ giving advice, guidance and support.
- Implement protocols to ensure quality, standard communications and collateral

Measuring our achievement:
- Increased income to branches & support groups from supporters
- Increased income from branches to other branches and central funded initiatives
- All feedback will be recorded and monitored
- Increased repeat and multi-year fundraising volunteers
- Improved relationship management and stewardship of volunteers by branches

UK-wide activity:
The area fundraising development pilot will guide our thinking about how best to deliver UK-wide support to all branches, support groups and local fundraising groups.

Direct marketing

Definition:
Direct Marketing means communicating directly and deliberately with targeted individuals using direct methods (eg post, telephone or email) to solicit a response. At the MS Society our primary purpose of direct marketing is to raise funds.

Key Achievements to date:
1. Established a donor recruitment programme with control and test segments for one-off donations.
2. Established a retention programme including newsletter and telephone upgrades.
3. All fundraising and giving data is now held on one database.
4. Consistent direct mail appeals have been developed across all four nations.

We will:
- Generate minimum of £6.0m per annum by 2015 across the UK
- maximise income and keep costs down whilst focusing on long term giving
- invest in recruiting new donors to ensure sustainable income
- increase tax efficient giving across all donations
- increase our knowledge and understanding of donors

Our core objectives:
- raise increasing levels of income with knowledge of life time giving
- recruit new donors at greater levels than our attrition rates
- reduce attrition by improved communication throughout the donor lifecycle
- make most effective use of data to target mailings to donors better
- monitor the marketplace to ensure we test all viable new channels of direct marketing
- work cross-departmentally to maximise the effect of integrating campaigns

Measuring our achievement:
- increasing levels of income including increased average gift values
- raise funds in the most cost-effective manner, operating at a minimum 2.6:1 ROI
- increasing numbers of active donors year on year to grow gross income
- increasing percentage of donors giving tax efficiently
- increasing donor satisfaction

UK-wide activity:
The direct marketing programme is combined for donor appeals UK-wide. The acquisition of donors and donor development will be considered for efficiency UK-wide with localisation as required to get best results.

Legacy fundraising

Definition:
A legacy is a gift (either a fixed sum of money, or part/all the estate) left by a person in their will. The MS Society relies heavily on legacy income. We have now begun to pro-actively promote legacy giving as a significant act of generosity to a favoured charity.

Key Achievements to date:
1. Established a forecasting model which identifies pipeline income and number of notifications for trending.
2. Established a basic enquiry and pledger development programme.
3. It is now understood that legacies left to branches must be spent on local need or national priorities.

We will:
- Generate minimum of £9.5m pa by 2015
- Maximise income from legacies through effective case management.
- Increase knowledge and understanding of existing legators to target new pledgers.
- Invest in marketing legacies to ensure this level of income remains high.

Our core objectives:
- recruit new pledgers from across the Society especially through branches
- develop the commitment of legacy pledgers through improved communication
- engage the whole society in legacy fundraising messages
- monitor the marketplace and test new methods of promoting legacies
- manage all existing cases efficiently to retrieve full sum of monies owed to us in timely fashion

Measuring our achievement:
- increasing levels of income including increased average gift values
- increasing levels of notifications from estates
- raise funds in the most cost-effective manner, operating at a minimum 19:1 ROI
- increasing numbers of active pledgers by 10% year on year
- increasing pledger satisfaction

UK-wide activity:
Legacy giving is not promoted enough across any nation or within branches. This must be rectified and a consistent message about the importance of legacies to the five key areas of the MS Society strategy be delivered. Since the RSPCA recent cases, it is important that legacy case management is done by experienced legacy administration staff.

MS Society commercial enterprises

Definition:
Commercial enterprises make up a very small amount of net income. This includes straightforward retailing such as our annual Christmas catalogue and income generation through mutually beneficial arrangements (e.g. our insurance product). We receive income from advertisements placed in MS Matters and sponsorship of our events. The MS Society has its own trading company (MS Trading Ltd) through which we are required to channel all income from commercial activities.

We do not yet maximise income from investment in commercial activities such as the funding of new products or services for people affected by MS. This would deliver on our mission to beat MS whilst simultaneously delivering a sustainable income stream.

Key Achievements to date:
1. Established supplier sells MS Matters advertising space on our behalf.
2. Sponsorship of events such as MS Life and MS Society Awards.
3. Established procedures for branch commission on Christmas catalogue.

We will:
- Maximise income from affinity products and advertising in our communication channels whilst providing valuable services for people affected by MS
- Maximise commercially driven income generating opportunities, particularly licensing and sponsorship
- Undertake a review of our shops in 2011 to maximise income and ensure best retail practice
- Undertake a review of the commercial propositions available to us and propose a structure through which this would be acceptable for the Society

Our core objectives:
- protect our brand at all times through working with reputable suppliers
- maintain a high level of service or product from partners for people affected by MS
- promote the trading opportunity where appropriate through MS Society channels

Measuring our achievement:
- Increasing income
- Diversity of offers
- Complaints about services provided through third parties will be monitored

UK-wide activity:
Where relevant, personnel from each nation will participate in any working group with respect to new trading opportunities. Branches will be engaged as channels for information about trading opportunities.

Donor Management and Data

Definition:
Underpinning all the national fundraising that we undertake in the Society is our supporter management which relies on the Society's fundraising database. This enables us to provide a high level of donor stewardship as well as data to maximise income from existing and new supporters.

Key Achievements to date:
1. All MSNC and nation fundraisers use one version of Raisers Edge. All data is shared across these fundraisers.
2. Procedures and protocols for data use are being shared across all four nations.

We will:
- Deliver excellent customer service to all donors and fundraisers – making sure we get their experience "right first time".
- Ensure that the database is used to its full potential,
- Work to deliver integrated data as per the e-strategy to show a 360 view of supporters.
- Ensure consistency in our donors' data management and data protection.
- Continually seek ways to improve donor experience through use of consistent supporter service and data standards.
- Create a comprehensive range of analytical tools.

Our core objectives
- Establish consistent supporter service level agreements so that our donors and fundraisers know how we will respond
- Reconfigure attributes and tables to enable storage of clear, uniform data
- Work with Communications team on development of the web pages for online gifts
- Invest in tools to improve inputting efficiency by streamlining systems
- Ensure appropriate training for all users of our database and customer care processes
- Ensure the highest standards of data protection and ensure users are sufficiently trained in this area (ongoing)

Measuring our achievement:
- Monitoring of fundraiser and donor complaints
- Monitoring of fundraiser and donor satisfaction
- Monitoring data quality and data input quality
- Percentage of fundraising staff using database on daily basis
- Percentage of new fundraising staff trained on database within first 3 weeks of employment
- Completion of an MS Society fundraising database user's guide

UK-wide activity:
All the above applies UK-wide.

Title	Strategic Objective	Definition	Mitigating strategy	Contingency Plan	Impact	Likelihood	Total Residual Risk	Actions + Timelines	Documentation	Risk owner	Date risk last reviewed
Fundraising Directorate	Funding the MS Society strategy	Investment in fundraising does not produce required income to cover 2011 business plan for MS Society	MS Society has a balanced portfolio of income streams. Business plans are written and project proposals for all new investment.	Quarterly forecasting of income. Further investment in fundraising activities will be adjusted if income is seen to be falling.	4	4	16	Quarterly review of fundraising business plans.	management accounts	Nicola Tallett	04-Jan-11
Partnership Fundraising	Funding the MS Society strategy	Information on budgeted activities across MS Society is not appropriate for fundraising asks: ie not timely, not detailed, not costed or does not have outcomes.	Fundraisers building closer relationships with rest of organisation. Directors and teams know importance of working with fundraising to deliver details.	raise to EG to develop further communications plans between departments	2	3	6			Saul Heselden	04-Jan-11
Fundraising Directorate	Funding the MS Society strategy	Key staff are not in post for delivery of fundraising and marketing plans.	Raising profile of fundraising at MS Society through networking and comment pieces. Investing in existing staff for development.	Use of temporary staff. Use of consultants or agencies.	3	2	6			Nicola Tallett	04-Jan-11
Fundraising Directorate	Funding the MS Society strategy	Management of fundraisers and products UK-wide work against team working. Processes and systems do not support teamwork.	Fundraising strategy outlines that new processes for management of products and staff need to be implemented.		2	2	4			Nicola Tallett	04-Jan-11
Database team	Funding the MS Society strategy	Data is lost or database servers go down. Thus fundraisers have no details of supporters to work with.	Database is backed up every night. Back up is stored safely. Raisers Edge is an off the shelf product so launching data onto new system would be possible. Legacy and branch income would be largely unaffected.	Wavex to relaunch data asap for continued working.	4	2	8	Need to test back up reload. Develop a contingency plan in case server explodes (ie time to purchase, establish server, reload etc).		James Dungate	04-Jan-11
Partnership Fundraising	Funding the MS Society strategy	Society staff and volunteers build relationships and develop communications with donors and high profile supporters, outside of the fundraising team. Thus leading to multiple messages and asks being made of supporters.	Fundraisers are tasked with account management of key relationships. In 2011 processes of relationship management to be strengthened and profile of the account managers to be raised.	Discuss with other Directors where necessary to develop further communications plans between departments	4	4	16	Fundraising to develop relationship management protocols for donors and high profile supporters.		Saul Heselden	04-Jan-11
Partnership Fundraising	Funding the MS Society strategy	The society is not able to articulate the need, outcomes and costs for our work in order to sell this proposition to donors.	Fundraisers engaging with teams across the society to understand need and costs.	Discuss with other directors where necessary to develop outcomes and cost analyses	3	3	9			Saul Heselden	04-Jan-11
Fundraising Directorate	Funding the MS Society strategy	External factors (such as national events, other charity appeals, disasters and economic environment) affect the generosity of donors.	MS Society has a balanced portfolio of income streams and activities planned throughout the year. Fundraising leads objectives to be aware of external environment and competitor fundraising activities.	Quarterly forecasting of income. Further investment in fundraising activities will be adjusted if income is seen to be falling.	2	3	6			Nicola Tallett	04-Jan-11

Title	Strategic Objective	Definition	Mitigating strategy	Contingency Plan	Impact	Likelihood	Total Residual Risk	Actions + Timelines	Documentation	Risk owner	Date risk last reviewed
Fundraising Directorate	Leading the MS Agenda	No investment in marketing our brand lowers the brand awareness and the value of our charity brand.	Organisational awareness of zero investment in branding. All areas to work on other aspects to raise the profile of the organisation within the brand values (ie media, online, campaigning)	Consider moving investment from other activities to pay for brand advertising.	3	5	15	Brand values to be raised across branches and members. Prioritise corporate partnerships that would bring some brand association and profile raising. Ensure direct marketing spend is broadcast as well as direct mail.		Nicola Tallett	04-Jan-11
Marketing department	Support	Membership product is not enticing or not promoted to people affected by MS so we fail to engage with them.	New membership promotion campaign. Start review of membership product.		3	3	9			Monika Nariani	04-Jan-11
Marketing department	Funding the MS Society strategy	legacy income continues to fall or is designated to branches. This means less net income to cover central paid for costs.	Strong legacy management at MSNC to identify only those cases where legally income must be restricted. Good communication with branches about how to spend designated legacy income. Better communication with branches about nationally funded initiatives they could invest in. Legacy marketing campaign to ensure wills are undesignated.	Firmer control over new expenditure of branches and branch reserves.	4	2	8			Monika Nariani	04-Jan-11
Fundraising Directorate	Funding the MS Society strategy	There is financial impropriety at an MS Society event, fundraising activity, branch, office or shop. This leads to mistrust from donors and income drops.	Strong fundraising management experience. Training for local fundraisers on how to manage their fundraising legally and safely. Internal audit reports on areas of concern.	Media statements for damage limitation	3	3	9			Nicola Tallett	04-Jan-11
Fundraising Directorate	Funding the MS Society strategy	A branch, support group or volunteer acts illegally or unsafely within a fundraising activity and damages our reputation.	Strong fundraising management experience. Training for local fundraisers on how to manage their fundraising legally and safely. Internal audit reports on areas of concern.	Media statements for damage limitation	3	3	9			Nicola Tallett	04-Jan-11
Community & Events Department	Funding the MS Society strategy	An incident happens at an MS Society event (organised by us or on our behalf) in which someone is injured or property damaged. Thus people do not want to attend future events.	Strong event fundraising management experience in house. Training for local fundraisers on how to run events. Risk logs are prepared for events.	Media statements for damage limitation	3	3	9			Diana Gornall	04-Jan-11