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Board Meeting - 12 June 2020

**Board Paper No. [4]**

|  |  |
| --- | --- |
| **For Decision** | **Recommendation**  Board members asked for feedback. |
| **For Monitoring** |
| **For Information** |

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**FUNDRAISING PLAN**

**May – November 2020**

This Fundraising Plan is the first in a series linked to the new Fundraising Strategy 2020-2023. The Plan is intended to provide the detailed fundraising focus for the organisation, including targets, roles and responsibilities, and progress will be reviewed at least every three months and the plan updated every six months.

The OSS Executive Director will manage the development and progress of this plan along with Programme Officer Cécile Dermit. It will be supported and guided by the OSS Board, Fundraising Committee members and, in terms of research, the Research Advisory Group. It seeks to underpin the fundraising pyramid target of raising £300,000, termed internally as an ‘Advancement Campaign’, by the end of 2021 to move OSS on to a more sustainable footing.

**Fundraising Targets**

The fundraising target for May to November, 2020 has been set at a minimum £10,000 in order to ensure OSS remains viable through to the end of the current financial year, 1 April, 2021. However, in line with the strategy the ambition is to secure £150,000 per year and £300,000 by the end of 2021.

**OSS Fundraising Pyramid for £300k – concluding calendar year end 2021**

**£198,750**

5k

300k

**All other potential donors**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Target** | **Cumulative** |  | **Potential prospects** | **GROSS TARGET: £300,000 RECEIVED/PLEDGED: £126,900** **NET TARGET: £173,100**  **Pledged/Received** | **Net Target** |
| 100k | 100k | **2 @ 50k (8 prospects)** | Fidelity, Ann Budge, Brian Souter Brodies, Aegon, Martin Gilbert, Malcolm Offord | Aberdeen 37.5k, TO’S 45k | **255k** |
| 60k | 160k | **3 @ 20k (12 prospects)** | Roy Leckie, Stuart Leckie, Dunedin, Hampden & Co | Steel Asset 9k  Stephen Fairfield 10k | **230k** |
| 50k | 210k | **5 @ 10k (20 prospects)** | Wildland (15k), Garfield Weston, Douglas Noble, Mactaggart | CR CAF 10k | **211k** |
| 40k | 250k | **8 @ 5k (32 prospects)** | PF Trust, David Shaw Stewart Rathbones, Stafford Trust | Gower/Vine Trust £2400  More Partnership £4500 | **211k** |
| 30k | 280k | **12 @ 2.5k (48 prospects)** | Munro/Noble, Aegon |  | **£206,500** |
| 15k | 295k | **15 @ 1k (60 prospects)** | K Dalglish, T McNab. D Mackay, D Smith, J Weir, D Ledingham, S Middleton, G Hartop | 5 @ 1k: Rose, IM, SF (CR) Whyte, Campbell | **£201,500** |

**Five target audiences**

1. Existing Donors
2. Major Individual Prospects
3. Trusts and Foundations
4. Supporters and Corporate Partners
5. Government and other external agencies

**1. Existing donors**

In recognition that existing donors are often the best sources of new donors, we will target all existing donors (Appendix 1) with the new OSS stewardship programme (Appendix 2), launching on 1 June. Full stewardship plans have been created for all donor categories and responsibility for managing each donor will be confirmed with the Fundraising Committee. All communication will be managed by OSS Programme Officer Cécile Dermit, and most will come from the OSS Director, but there will be exceptions where close relationships offer a more personalised approach. An exclusive OSS Webinar for existing donors is being planned for 1 July with a leading politician and/or sport personality invited to take part, to reward and engage donors.

**2. Major Individual Prospects**

The personalised cultivation of major individual prospects will continue to be guided by the Fundraising Committee, pyramid and strategy, and managed by Cécile through the eTapestry system, with progress reports at each fundraising committee. The prospects and OSS leads for May-July are as follows:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Prospect | OSS | Prospect | OSS | Prospect | OSS |
| Douglas Anderson | **Bob Reid** | Richard Burns | **IM** | JK Rowling | **IM** |
| John Mactaggart | **IM** | David Shaw Stewart | **IM** | Roy Leckie | **CR** |
| Martin Gilbert | **CR** | Stuart Leckie | **CR** | Christine Weir | **CR** |
| Douglas Noble | **CR** | Doug Smith | **DF** | Ian Gray  David Reekie  Terry Raconzier  Cahal Dowds | **DF** |
| Keith Neilson | **DF** | Malcolm Offord | **DF** | Graeme Hartop | **DF** |

**3. Trusts & Foundations**

After a period of screening of UK trusts and foundations March-May 2020, around 90 targets have been identified for approaching in 2020-21. A minimum of 15 will be approached prior to a review of progress by Fundraising Committee and report to next board meeting, on 28 August, 2020.

All communication will be managed by OSS Programme Officer Cécile Dermit, and most will come from the OSS Director, with all Fundraising Committee members copied in to all correspondence, but there will be exceptions where closer relationships offer a more personalised approach from Committee members.

Plan for applications:

* 1-30 June – Applications to Garfield Weston, Fidelity, Bank of Scotland Foundation, Ellerman Trust, Stafford Trust and Volant Trust.
* 1-31 July - Applications to tbc
* 1-14 August – Applications to tbc

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Trust/Foundation | Trust / Foundation contact | Date application sent | Confirmation received | Amount requested | Core or Research | Date of payment | OSS contact |
| Garfield Weston |  |  |  |  |  |  |  |
| Fidelity |  |  |  |  |  |  |  |
| Bank of Scotland Foundation |  |  |  |  |  |  |  |
| Ellerman Foundation |  |  |  |  |  |  |  |
| Stafford Trust |  |  |  |  |  |  |  |
| Volant Trust |  |  |  |  |  |  |  |
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4. **Supporters and Corporate Partners**

**Supporters**

The goal from this group is to secure regular annual income of £15,000 (12.5%) of OSS £120,000 turnover. To May 2020, we have secured donations of £100 to £1000 from 26 Supporters, and we expect this to rise with a new strategic focus on renewals. A new stewardship plan (Appendix 2) will be launched on 1 June with personal communication to all existing donors from the OSS Director, followed by regular communication, and support from Fundraising Committee members when required.

The more general database of over 800 contacts has now been transferred to the new eTapestry CRM system (May 2020). From 1 June all contacts will be emailed with a census, to collate additional information, and an ‘ask’ to donate, with guidance from Fundraising Committee on what to include with emails, ie OSS research and news, pointing donors to a wide range of sport research, as an indication of progress.

**Corporate Partners**

OSS currently has two corporate partners - The More Partnership (£1,500) and Alan Steel Asset Management (£3,000), both secured in October 2019 and contributing a combined £4,500 per annum from 2019-2021. Potential prospects Hampden & Co Bank and Dunedin LLB have deferred support at least until late 2020 as a result of the COVID-19 impact on financial markets. Three further Corporate Partners to be identified and strategies created by 14.08.20.

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| Corporate | Corporate contact | Date sent | Confirmation received | Amount requested | Amount received | Date received | Core / Research | OSS contact |
| Alan Steel Asset Management |  |  |  |  | £3000 pa | Oct 2019 | Core |  |
| The More Partnership |  |  |  |  | £1500 pa | Oct 2019 | Core |  |
| Dunedin LLB |  |  |  |  |  |  |  |  |
| Hampden & Co Bank |  |  |  |  |  |  |  |  |
| Aegon |  |  |  |  |  |  |  |  |

**5. Government and other stakeholder research contracts**

The OSS has increased its work around seeking income through the securing of contracts to provide external research to stakeholders including the Scottish Government. OSS is currently in discussions with the Scottish Government about one contract associated with the 2023 Cycling World Championships. This route to income generation will be led by the OSS Executive Director and developed in conjunction with the Research Advisory Group and progress reported back to the Board and Executive Committee.

**David Ferguson**

Appendix 1

**OSS DONORS 2020-21**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| FOUNDING FUNDERS | | | | | |
|  | **Donor** | **Donation** | **Core or Research** | **Date** | **Steward** |
| 1 | **Alerce Trust** | £150,000 - 50k x 3 | Core | 2017-19 | CR |
| 2 | **Aberdeen Standard Investments CF** | £87,500 - 50k 2017-18  (+ in-kind space for meetings & breakfasts) | Core | 2017-18 | David |
| 3 | **Tam O’Shanter Trust** | £75,000 - 25k x 3 | Core | 2018-20 | Charlie |
| 4 | **Wildland** | £35,000 | Research | 2017-18 | Charlie & Iain |
| 5 | **Charlie Raeburn (CAF)** | £30,000 | Core | 2017-2018 |  |

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|  | RENEWAL FUNDERS | | | |
|  | **Donor** | **Donation** | **Date** | **Steward** |
| 1 | **Aberdeen SICF** | £37,500 - 12.5k x 3 | 2019-21 | David |
| 2 | **Tam O’Shanter Trust** | £45,000 - 15k x 3 | 2021-23 | Charlie / David |
| 3 | **Charlie Raeburn (CAF)** | 10k | 2019 | Charlie & OSS |
| 4 | **Stephen Fairfield** | 5k x 2 | 2019 & 2020 | Iain & OSS |
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| CORPORATE PARTNERS | | | | | | |
|  | **Donor** | **Gold**  **(2500+)** | **Silver**  **(1500-2499)** | **Bronze**  **(500-1499)** | **Date** | **Steward** |
| 1 | **QTS** | £3000 |  |  | 2018 | Iain |
| 2 | **Alan Steel Asset Management** | £3000 x 3 |  |  | Nov 2019 | Charlie |
| 3 | **House of Hearing** |  | £2000 |  | 2018 | Iain |
| 4 | **More Partnership** |  | £1500 x 3 |  | Oct 2019 | Iain |
| 5 | **John Gordon & Son** |  |  | £250 | 2018 | Iain |
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| TRUSTS & FOUNDATIONS | | | | | |
|  | **Donor** | **Funding** | **Date grant received** | **Next application period** | **Steward** |
| 1 | **People’s Postcode Lottery** | £20,000 | 2018 - declined 2019 |  |  |
| 2 | **Crerar Trust** | £10,000 | May 2018 |  |  |
| 3 | **PF Trust** | £5000 | 2017 |  |  |
| 4 | **WM Mann Foundation** | £1000 | 2018 |  |  |
| 5 | **Ian Mactaggart Trust** | £500 | 2018 |  |  |
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| INDIVIDUAL SUPPORTERS | | | | | | |
|  | **Donor** | **Gold**  **(2000+)** | **Silver**  **(500-1999)** | **Bronze**  **(100-499)** | **Date** | **Steward** |
|  | **Iain More** | £2000+ |  |  | 2017,19, Feb 20 |  |
|  | **Alistair Whyte** |  | £1000 |  | Nov 2019 | David - IP |
|  | **Stuart Leckie** |  | £1000 |  | Nov 2019 | Charlie - IP |
|  | **Barry Rose** |  | £1000 |  | April 2020 | Charlie/Iain - IP |
|  | **Fraser Campbell** |  | £1000 |  | Jan 2020 | Charlie/Iain - IP |
|  | **Iain More** |  | £1000 (500x2) |  | Jan & March 2020 |  |
|  | **David Shaw Stewart** |  | £700 |  | Oct 2018\* | David - IP |
|  | **David Ferguson** |  | £550 |  | Oct 2019 | David |
|  | **Richard Yule** |  | £500 |  | Nov 2019 | Charlie - IP |
|  | **Johnny Weir** |  | £500 |  | Feb 2020 | David - IP |
|  | **Stuart Armstrong** |  |  | £375 | Feb 2020 | OSS |
|  | **Pam Siler** |  |  | £250 | Feb 2020 | OSS |
|  | **Anna Mundell** |  |  | £250 | Aug 2019 | OSS |
|  | **Robert Dick** |  |  | £250 | Feb 2020 | OSS |
|  | **David Rider** |  |  | £250 | Nov 2019 | OSS |
|  | **Iain Johnston** |  |  | £250 (£240.15) | Nov 2019 | OSS |
|  | **Frances Smith** |  |  |  |  | OSS |
|  | **Sir Charles Fraser** |  |  |  |  | OSS |
|  | **Duncan Clark** |  |  | £250 | Feb 2020 | OSS |
|  | **Sandy Needham** |  |  | £250 | March 2020 | OSS |
|  | **Bruce Wallace** |  |  | £250 | April 2020 | OSS |
|  | **David Mackay** |  |  | £150 | Feb 2020 | OSS |
|  | **Bruce Lawson** |  |  | £100 | April 2020 | OSS |
|  | **Keith Oliver** |  |  | £100 | Dec 2019 | OSS |
|  | **Graham Cook** |  |  | £100 | Dec 2019 | OSS |
|  | **John Wright** |  |  | £100 | Dec 2019 | OSS |
|  | **Phil Anderton** |  |  | £100 | Feb 2020 | OSS |
|  | **David Wright** |  |  | £110 |  | OSS |

Appendix 2

**OSS STEWARDSHIP PLAN**

**2020-21**

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| STEWARDSHIP PROTOCOLS | | | |
| Type of Donor | **Communication** | **Communication** | **OSS Staff Input** |
| Founding Funder | Newsletter & personal email  Personal letter (posted)  Advance notice of research with personal note from researcher  Event invitations - donor webinar | Monthly  Annual | Newsletter & email  Personal Steward  Research updates  Event invitations |
| Renewal Donor | Newsletter & personal email  Personal letter (posted)  Advance notice of research  Event invitations - donor webinar | Monthly  Annual | Newsletter & email  Personal Steward  Research updates  Event invitations |
| Corporate Donors | Newsletter & personal email  Personal letter (posted)  Advance notice of research with personal note from researcher  Event invitations - donor webinar | Monthly  Annual | Newsletter & email  Personal Steward  Research updates  Event invitations |
| Trusts & Foundations | Newsletter & personal email  Personal letter (posted)  Research updates | Monthly  Annual | Newsletter & email  Research updates  Event invitations |
| Individual Supporters | | | |
| GOLD | Newsletter & personal email  Personal letter (posted)  Advance notice of research – with personal note from researcher  Event invitations - donor webinar | Monthly  Annual | Newsletter & email  Personal Steward  Research updates  Event invitations |
| SILVER | Newsletter & personal email  Personal letter (posted)  Advance notice of research  Event invitations - donor webinar | Monthly  Annual | Newsletter & email  Personal Steward  Research updates  Event invitations |
| BRONZE | Newsletter & personal email  Research updates  Event invitations - donor webinar | Monthly  Annual | Newsletter & email  Research updates  Event invitations |