

Foundation Strategy: Communications, Events, Stewardship, KPIs

Foundation Communication Strategy

The strategy objective is to reach as many prospective supporters as possible through a range of channels and formats and with increasing frequency while respecting GDPR and recipient communication preferences. Interesting content that engages alumni, parents, ex-staff and the wider community will be shared more frequently with hard copy mailings reduced where appropriate to minimise cost and the carbon footprint. Fundraising successes and bursary testimonials will be threaded through the channels.

The Foundation will create and share content as well as utilising School material. Focus will be given to securing registrations to the website and obtaining email addresses – this will be reported as a KPI.

Publications and Posts

Easter News (April) - electronic

A smaller publication of alumni news snippets and brief stories that will be sent at Easter. It will be published on the alumni website and promoted by email and social media channels. It will be available on the alumni website as a soft copy.

Alumni Annual Review (September) – hard copy and electronic

The Review will be sent to everyone on the mailing list to coincide with ‘back to school’. It will follow the format of recent Reviews but will have less content and omit the Annual Giving Report to reduce production time and mailing costs. It will be sent to all alumni, ex-staff, past parents and donors who have provided a mailing address. It will also be sent to the parent body. It will be available on the alumni website as a soft copy for those who wish to reduce their carbon footprint.

Annual Giving Report (December) – hard copy and electronic

This will be a standalone publication that reports on the funds raised for the past financial year, recognises those who have made donations, explains how the funds have been used and promotes the targets. It will include testimonials from individuals who have benefited from bursaries and hardship support, as well as from beneficiaries of capital projects. It will be sent to all donors, to selected prospective donors and to parents in hard copy, but will have a much smaller circulation than the Annual Review to target those who are engaged in supporting the Foundation. Its mailing in early December will enable Christmas cards to be included as part of the stewardship process.

Monthly Alumni e-newsletters (increasing to fortnightly and then weekly)

These will be soft copy newsletters that will be emailed directly and posted on the alumni website each month. They will be short articles of news relating to alumni including professional achievements, charitable fundraising activities, births/deaths/marriages, archive photos and reports from alumni events. There will be links to the alumni website if an item requires a longer article to be published on that platform. Material from these publications will be available to be shared in the School e-zines where appropriate and of interest to parents, pupils and staff.

Social media posts (weekly)

Facebook remains the primary channel for older alumni who are most likely to be in the donor zone so the aim is to post three articles per week on both the RGS alumni page and the AOS alumnae page with links to longer articles posted on the alumni website. Photos will be posted three times per week on Instagram with online Archive material making this simple once it is in place. Alumni related and interesting school tweets are shared with the alumni community.

LinkedIn (periodic) will be used to share professional news and achievements related to alumni and the School. These will be less rigid in frequency and will be carefully selected for the tone of this platform.

Fundraising Literature (bi-annual)

The alumni community can expect to receive two hardcopy fundraising mailings per year outside of the Annual Giving Report: for the Annual Fund and for capital projects or legacy gifts. Soft copies of brochures and donor forms will be posted on the website and promoted via email and social media.

Other mailings

Copies of Excel are posted to a small number of VIP supporters.

Copies of the Worcesterian are posted to the leaving Class to which the publication refers.

Foundation Strategy Event Programme

Each event needs to serve a purpose that relates to the strategic objective of the Foundation to warrant time, effort and budget being allocated. To support the strategic objectives the Foundation Office may initiate or support:

1. Alumni relation gatherings to build affinity to the School and reinforce shared bonds.
2. Fundraising occasions where there is a clearly stated purpose to solicit donations.
3. School events where the Foundation Office can create synergy with alumni and donors towards RGS.

Events will be a mixture of self-funding, part-funding and School-funded through the Foundation Office budget. Ticket sales for events will be managed through the alumni website.

New event calendar to run from September 2021 as part of the engagement strategy:

- London events will be restarted (a donor has agreed host a reception at The Travellers Club).
- RGS and AOS former pupils will have specific gatherings to reflect their affinities to the School.
- Year group and cohort reunions to be instigated** (Class of 2011 and Class of 1990 will be first)
- Reunions for younger alumni to be held to rekindle affinity after University.
- Donor Stewardship gatherings with available Trustees, Governors and School Leadership – at School or Sixways, County Cricket 20/20 or in London.
- Instigate an alumni weekend** where a range of events are hosted at the School to raise the profile and engagement with a wide range of former pupils. It will become annual event fixed in the calendar.
- From 2022 onwards, at least one major designated fundraising event** per year with a clearly advertised objective of securing significant funds for the Annual Fund eg a Bursary Banquet or Sports Dinner where guests make donations on the night and through the ticket price.

** Events to be scheduled at School / sports grounds, working with School calendar

Draft Event Calendar – year group reunions to be added around School availability

Month	Event	Location	Fundraising Opportunity	Ticket cost	Key Personnel	FO Budget (estimate)
January	Open Morning	Schools	n/a	Free	FD, SLT,	n/a
February	Challenge Cup	Sixways	limited	£10 to venue	n/a	n/a
March	Alumni Footballers	The Grange	Regular giving sign-up leads	£5 per head	Football Dept, FO staff	£200
March	Superball	Uni Arena	limited	£10 to venue	n/a	n/a
March	Choral Concert	Cathedral	n/a	Free	n/a	n/a
March	DIY Theatre production	School PAC	Seat s/ship, reg giving sign-up	£10 to venue	FO staff	n/a
April	AOS London Drinks Reception	Tbc	Gift solicitation, regular giving sign-up leads	Tbc	FO staff, Trustees, HM	£3,000
May	Legacy Society Luncheon	School	Gift solicitation, regular giving sign-up leads	Free	FO staff, Trustees, HM	£1,000
May	AOOE AGM	School	n/a	Free	FO staff, HM, DHM	n/a
June	Creative Arts	School	limited	Free	FO staff	n/a
June	AOS Summer Gathering	School	Gift solicitation, regular giving sign-up leads	Tbc	FO staff, Trustees, HM	£1,000

July	Henley Royal Regatta	Henley	Gift solicitation, regular giving sign-up leads	Tbc	FO staff, Trustees	£500
August	n/a	n/a	n/a	n/a	n/a	n/a
September	Golf Day	Worcester	limited	£50	Trustees, FO staff	£300
October	Modus Cup	Sixways	Reg giving sign-up leads	£10 to venue	FO staff, Trustees	£400
November	RGS London Drinks Reception	Club	Gift solicitation, regular giving sign-up leads	Tbc	FO staff, Trustees	£3,500
November	Senior Drama Production	School PAC	Gift solicitation, regular giving sign-up leads	Free	FO staff, Trustees, SLT	£2,500
December	AOOE Annual Dinner (run by the Association)	School Perrins Hall	Gift solicitation, regular giving sign-up leads	£35	FO staff, trustees,	n/a
December	Prior leaving class Xmas drinks	School	n/a	Free	FO staff, school staff, HM	£800

Donor Recognition and Stewardship Strategy

The strategy will implement a structured approach to stewarding donors and gifts will be implemented.

Category	Value	Lead Steward	Additional Steward(s)
Gift	£1 - £999	Foundation Office	Foundation Director
Middle Gift	£1,000 to £9,999	Foundation Director	Foundation Chair
Major Gift	£10,000 to £49,999	Foundation Chair & Headmaster	Foundation Director
Substantial Gift	£50,000 to £149,000	Headmaster & Foundation Chair	Chair of Governors, DFO, Foundation Director
Transformative Gift	£150,000 to £499,000	Headmaster & Foundation Chair	Chair of Governors, DFO, Foundation Director
Naming Gift	£500,000+	Chair of Governors, Headmaster, Foundation Chair	DFO, Foundation Director
Legacy Pledge	Usually not disclosed	Foundation Director	Headmaster & Foundation Chair
Regular Gift	£1 - £999	Foundation Director	Foundation Chair

Within 48 hours

All single gifts will receive an initial phone call from the Foundation Office to confirm receipt and to express gratitude. For regular gifts, a phone call will be made for the first gift and every 12th instalment. Where phone details are not held, an email will be sent. Contact then determined by the moves management process.

Within 5 days

A letter of thanks will be prepared in the Foundation Office for the Lead Steward(s) to send and the Additional Steward(s) will be informed of the gift. The Foundation Office will process the donation on the database and generate a gift receipt to be emailed or posted to the donor for his/her tax records. Anti Money Laundering (AML) checks will be made in line with the Gift Acceptance Policy. The Gift will be tagged for inclusion in the next Annual Giving Report, noting whether it is to be anonymous. The donor will be tagged to receive the Annual Giving Report and to be added to the Christmas card list.

Within 10 days

The donor's place on the moves management system in the Foundation Office database will be reviewed. The donor will be tagged according to the scale of the gift, the frequency, the prospect for future giving.

Category	Meaning
One-off	Unlikely to make further donations
Bronze	Small regular or ad-hoc donor within 'Gift' scale, with potential for future gifts
Silver	Middle Gift scale with potential for more and/ or long-term donor and/or a small legacy pledge
Gold	Major Gift scale, potential for more and/or a large legacy pledge
Green	Substantial Gift and above, and /or large legacy pledge

Trustees' Donor Reception

The Foundation Office will organise for donors to attend one of the Drama productions each academic year as guests of the Trustees. A reception will be held ahead of the production that will enable Trustees to meet with donors in person, to thank them for their support, to answer questions about future plans and to enable them to identify leads for donors who may be in a position to offer additional support

Headmaster High Table

For Gold and Green donors, more intimate gatherings will be hosted several times each year with Trustees and Governors present along with bursary ambassadors. The purpose is to express gratitude, to listen to feedback and to determine what future support may be possible.

Foundation Strategy Key Performance Indicators (KPIs)

Financial Result KPIs

- Funds raised: Regular Annual Giving and Endowment Fund(s) donations v targets
- Bursary places funded v target
- Capital project funds raised v target
- Major Gifts secured (number and value)
- Number of new major donors
- Grants secured
- Endowed funds held v 2041 target
- Return from Investment in Foundation Office expenditure
- Yield from Foundation Office expenditure

Productivity KPIs

- Number of prospective major donors 'asked'
- Number of Legacies pledged (value if possible to determine)
- Number of Grants applied for
- Number of regular donors (new and retained)
- % of time spent directly fundraising
- Number of prospective donors being stewarded in the moves management pipeline
- Number of 'lost' alumni reconnected

Event KPIs

- Number of Engagement events hosted and attendance
- Number of Stewardship events hosted and donor attendance
- Number of first-time attendees
- Funds secured at dedicated fundraising events.

Communication KPIs

- Number of members registered on the alumni website
- Number of alumni contactable by email
- Number of followers on Social Media channels
- Click through rate for mass emails
- Number of posts made on the website and Social Media
- Number of Bursary testimonials shared

Volunteering KPIs

- Number of Alumni engaging with pupils for careers and further education
- Number of hours given by volunteers to support the Foundation and fundraising activities

Frequency: Annual reporting of KPIs with termly updates.