

## Foundation Bursary Strategy Endorsements sought from Trustees:

<b>E1</b>	<b>The Case for Support for Bursaries</b>
This document with its vision, timeframe and targets will underpin the fundraising actions and communications for bursaries in the short and long-term.	
<b>E2</b>	<b>The twin track strategy for delivering bursary places</b>
Raising funds through a mass regular giving programme to address the need for additional bursary places at RGS now while securing major gifts and legacies to build the endowment funds to provide places that are funded in perpetuity.	
<b>E3</b>	<b>The targets for annual giving, major gifts and legacy gifts</b>
To increase the number of RGS pupils receiving bursaries from an average of 70 to 100 pupils By 2041 for the 30 additional places to be funded by income from the endowed funds. Achieved by raising £250k per annum with an interim target of £1.5m by 2026. Target of £5.25m raised by 2041 and with compounding of annual income delivers a total of £18.6m by 2041. To deliver £206k in annual regular giving by 2026 from 435 donors. To raise the number of major donors from 6 to 50 by 2026. To increase the number of legacy pledges from 34 to 100 by 2023.	
<b>E4</b>	<b>The Foundation Annual Fund to focus regular giving donations</b>
This fund will allow regular donations to be solicited under a simplified structure and for funds raised to be channelled into a single annual income stream from the Foundation to the School. It will enable Trustees to project future income when planning how to meet the needs of the School and report progress clearly.	
<b>E5</b>	<b>Using Legacy gifts to grow the A R Wheeler Bursary Fund and the Alice Ottley Fund</b>
Requesting donors make their legacy gifts in support of bursaries and that these donations be allocated to the most relevant of the two named bursary funds for respective supporters.	
<b>E6</b>	<b>Launching a Legacy Society to steward legacy pledgors</b>
Recognising the commitment made by pledgors and stewarding these donors during their lifetime to ensure legacy pledges remain in their Will and, where possible, are increased and/or the donor makes a living gift.	
<b>E7</b>	<b>Stewarding Donors by Scale and Frequency</b>
Implementing a moves-management process within the database that enables donors and prospective donors to be cultivated according to their gifts by scale and frequency.	
<b>E8</b>	<b>Key Performance Indicators</b>
Adopting a range of metrics to measure progress and report from an RGS baseline as well as against sector benchmarks. KPIs will reflect agreed financial targets, fundraising activity targets and alumni / donor engagement targets.	
<b>E8</b>	<b>The Communications strategy and calendar</b>
Increasing the frequency of communications to alumni, staff, parents and pupils to grow affinity and increase the propensity to support financially or in time & expertise. Integrate alumni and archive material along with fundraising messages more comprehensively across School communications.	
<b>E9</b>	<b>The Event Strategy and programme</b>
Widening the opportunities for donors/prospective donors to interact with the School and their fellow alumni within the programme reflecting alumni geography and wishes for cohort reunions.	
<b>E10</b>	<b>Alumni Support for Current Pupils</b>
Utilising alumni to share their experience and knowledge to guide pupils with Careers information and further education choices. Using remote video meetings and recorded videos.	