



Our WUTH Charity Strategy

2023-26

Foreword

I am delighted to invite you to read our Charity Strategy, which demonstrates our strategic focus for the next three years. Wirral University Teaching Hospital (WUTH) Charity has seen a significant increase in activity, support and public awareness since its restructure and relaunch in 2018. Despite two years of restricted activity due to COVID-19, there are many more opportunities for the Charity within the Wirral, Cheshire and Merseyside region.

The 2023-2026 Strategy is a forward look as the Charity resets and resumes more core activity. It sets out our ambition for WUTH Charity over the next three years, including the successful completion of the Tiny Stars Neonatal appeal.

This Strategy focuses on activities, which will strengthen the Charity, including communications, resources, and donor stewardship. Importantly, it outlines key priorities for critical areas of work over the next 3 years. Thank you to all our staff and supporters and we look forward to your continued involvement in WUTH Charity.

Sue Lorimer – Chair Charitable Funds Committee & Non-Executive Director

Contents

Contents	Page
Introduction	4
Trust Objectives and Priorities 2021-2026	5
Strategic Framework and Alignment	6
Roles and Responsibilities	7
Our Charity Journey 2018-2023	8
Our Financial Journey 2018-2023	9
Where Does our Funding Come From?	10
Our Charity Roadmap 2023-26	11
Developing our Charity Strategic Objectives	12
Our Charity Strategic Objectives	13
Our Charity Strategic Objectives	14
1. Improving Awareness and Visibility	15
2. Generating Income	16
3. Staff Engagement	17
4. Donor Stewardship and Database Management	18
5. Delivering Best Value and Measuring Impact	19
Strategic Alignment	20
Next Steps	20

Introduction

Our journey to deliver the best quality and safest care to the communities we serve

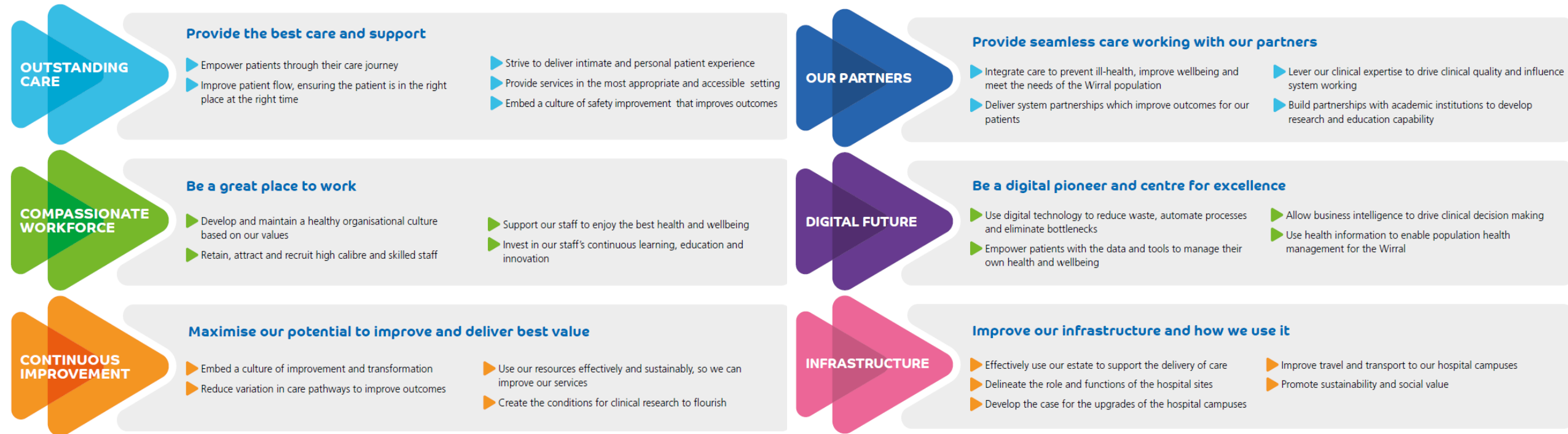
Following the restructure of the charity in 2018, the sole public benefit purpose of WUTH Charity has been patient benefit. However, during the COVID-19 pandemic, funds were raised nationally and locally to support staff and staff wellbeing. It is proposed that the strategic aims of WUTH Charity introduce staff wellbeing as a further area for support, with patient experience, medical equipment and environment remaining the main areas of benefit.

Our WUTH Charity Mission:

Together with our supporters and the public, we will improve the quality of WUTH's patient and staff experience even further through raising funds to make a difference at our hospitals.

Our 2021-2026 Objectives and Priorities

Our six strategic objectives and priorities demonstrate our intention to provide outstanding care across the Wirral through our hospital sites and units, and as a lead provider within the Wirral system. We will be a Hospital Trust that patients, families and carers recommend and staff are proud to be part of.



Strategic Framework and Alignment

Our WUTH Vision and Values set out what our patients can expect from us. Underpinning our Vision and Values, and aligning to the Trust objectives and priorities are the Foundations: Getting the Basics Right, Better, and Best. Alignment to our Vision, Values and Foundations is key to the successful delivery of all strategies.

Our six strategic objectives and priorities demonstrate our intention to provide outstanding care across the Wirral through our hospital sites and units, and as a lead provider within the Wirral system. We will be a Hospital Trust that patients, families and carers recommend and staff are proud to be part of.

The WUTH 2021-2026 Strategy will be delivered through eight enabling strategies. Each Trust micro strategy that is delivered aligns closely to one or more of our enabling strategies. All that we do is aligned to our Trust Strategic Objectives and our values, and as a registered charity, that supports but is a separate entity to the Trust, Our WUTH Charity Strategy supports all of our enabling strategies, with our intentions to:

- Support the Trust to enhance patient experience, outcomes and the environment by putting patients and families at the heart of everything we do.
- Support the Trust to improve the health and wellbeing of staff by supporting the staff wellbeing plan and NHS People Plan.

Achieving our Charity Strategy intentions will support us to deliver our vision: ***“together we will deliver the best quality and safest care to the communities we serve”***





Roles and Responsibilities

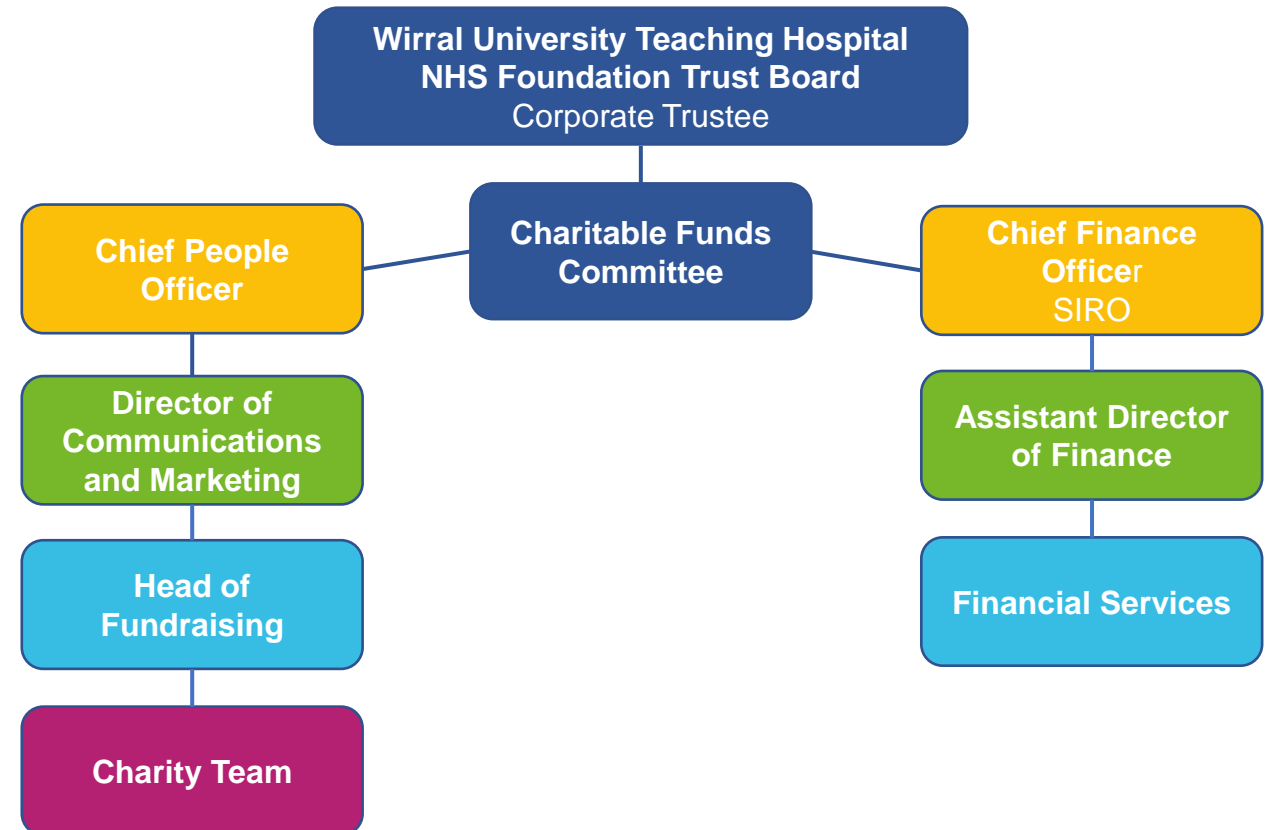
WUTH Charity Strategy Governance

The WUTH Trust Board, as Corporate Trustee, is responsible for the governance of WUTH Charity, and therefore ensuring that the Charity complies with legislation via the **Charities Act 2022** and **Charity Commission** and good practice guidance, via **the Fundraising Regulator**. The Board has a duty to ensure the Charity has a clear vision and manages the Charity in accordance with the Charity's purpose, as set out in the governing document.

The Charitable Funds Committee meets quarterly and is responsible for setting the vision, values, objectives and mission of the charity. They set targets and indicators of success, and review performance against these to identify whether the aims of the Charity are being met.

The roles and responsibilities of key individuals at WUTH can be observed in the WUTH Charity structure.

WUTH Charity Structure





Our Charity Journey 2018-23



**Wirral University
Teaching Hospital**
NHS Foundation Trust

Over 120 funds
were streamlined
down to 8:



Recruitment of 2
community and
events fundraisers



The first appeal (Tiny Stars Neonatal Appeal) was approved in 2019 and the recruitment of the Charity team was built into that plan, with an ambitious target to raise £1.5million in three years.

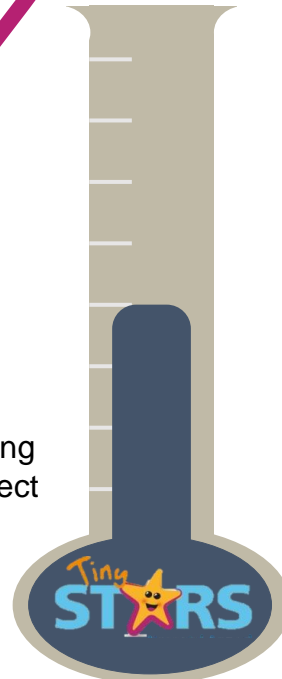
COVID-19 restrictions resulted in 18 months of fundraising activity being postponed or cancelled. Due to the restrictions, the Charity team were diverted to support staff wellbeing.

During the COVID-19 response, the team distributed £650,000 in kind donations to staff and managed the local COVID-19 appeal launched by Wirral Globe

Focus has returned to the Tiny Stars Neonatal Appeal which has raised £0.75 million raised so far out of the £1 million target*

The Retreat staff
restaurant and wellbeing
space - £413,000 project

*As part of the strategic review the target end point is being reviewed





Our Financial Journey 2018-23

Understanding our Financial Journey

In order for us to plan our strategic direction moving forwards, we need to firstly understand our journey over the last five years.

Figure 1 demonstrates our Charity financial reporting from 2018-2022.

In addition to the saving for the Tiny Stars Appeal, there are some key points to note:

- **2018** - Charity fund restructure and transfer of funds to Trust to purchase medical equipment, development of charity begins. £40,000 used to fund incubator and baby warmer for the Neonatal Unit.
- **2019** - Launch of Tiny Stars appeal and recruitment of team. £20,000 used to fund two haemofiltration machines for critical care.
- **2020** - COVID-19 and diversion of Charity Team to staff wellbeing. £219,000 used to fund patient bedside furniture across all wards at Arrowe Park Hospital.
- **2021** – Income of £610,000 from local fundraising appeal and NHS Charities Together national grants received. £194,000 used to fund two echocardiogram machines.
- **2022/2023** – £90,000 used to fund COVID-19 staff projects, and £413,000 used for The Retreat and staff wellbeing room.

Figure 1 – Total Gross Income 2018-2022

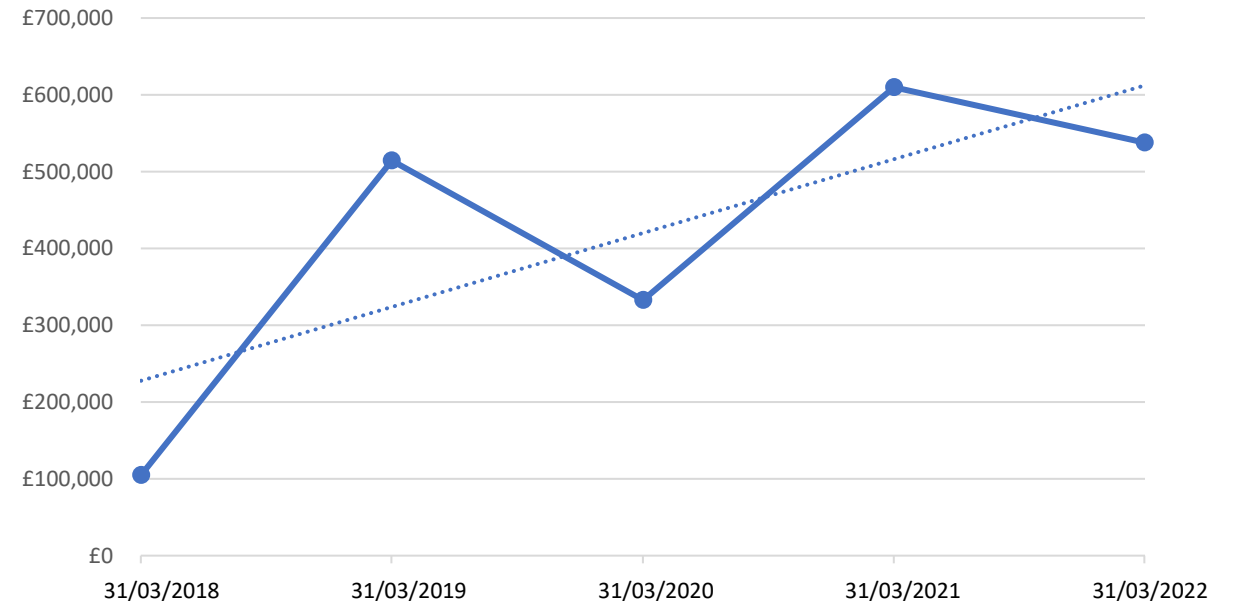


Table 1 – Total Gross Income 2018-2022

Income	31/03/2018	31/03/2019	31/03/2020	31/03/2021	31/03/2022
Total Gross Income	£105.00k	£514.73k	£333.00k	£610.00k	£583.00k



Charitable Funding Streams





Our Charity Roadmap 2023-26



Wirral University
Teaching Hospital
NHS Foundation Trust

📍 **2023-24**
Final year of our current
Major Appeal: Tiny Stars



📍 **2024-25**
Review of 8 existing funds to
ensure optimal strategic focus
and sustainability to maximise
impact.

📍 **2024-25**
Focus on next appeal
including targeted
consultation and
planning phase.

📍 **2025-26**
Public launch of new
appeal



Developing Our Charity Strategic Objectives

The strategic objectives and priorities for Our Charity Strategy 2023-26 have been developed through reflecting on our previous strategy and journey over the last five years, reviewing national policy, and how our charity mission aligns to the Trust Strategic Objectives.

Engagement workshops were facilitated with the Charity Team and the Charitable Funds Committee to understand where we are now, and where we want to be in three years. This information was used to develop the five strategic objectives, and the priorities that will underpin them.

Our Charity Strategic Objectives

- 1. Becoming the Charity of Choice**
- 2. Optimising Income**
- 3. Charity Champions**
- 4. Making the Most of Our Data**
- 5. Delivering Best Value and Measuring Impact**



Objective 1 – Becoming the Charity of Choice

Awareness and visibility are major elements of success to enable us to become the charity of choice across Wirral, so that we can promote the work we do, and support individuals to understand our purpose and the importance of their contributions.

We Will:

- Promote engagement within our hospitals and the wider community through improving awareness and visibility
- Ensure effective use of technology and physical resources to support successful charitable activities and spontaneous support including website, social media and print
- Build our pipeline of support through planned and proactive community and corporate engagement activity



Objective 2 - Optimising Income

Generating income is the primary focus of the Charity and enables us to achieve our mission to support the Trust to improve further the quality of WUTH's patient care. Throughout this strategy, we will do this by focusing on fundraising across all our income pillars, and activities that have a proven track record of raising charitable income.

We Will:

- Establish and roll out an annual plan to include our targets and resource against each of our income pillars
- Develop and maintain relationships with all stakeholders
- Establish proactive and robust approaches to successful events, fundraising activity and return on investment
- Review of our 8 existing funds to ensure optimal strategic focus and sustainability, to maximise impact
- Agree a target ratio between income and the costs of fundraising to ensure that the absolute maximum of funds raised directly benefit the quality of WUTH's patient and staff experience.



Objective 3 – Charity Champions

Our staff, volunteers, Trust members, Council of Governors and other stakeholders, are valued supporters of WUTH Charity. They are advocates of the Charity and key in signposting to the charity. They are also members of our community, as patients and families.

We Will:

- Continue raising awareness, and building staff knowledge and advocacy of and for the Charity
- Provide a range of opportunities for staff to support the Charity
- Communicate impact to improve confidence and awareness of our work
- Provide information and advice how to signpost grateful patients who wish to give to our Charity
- Improve the funding grant application process and experience for staff



Objective 4 – Making the Most of Our Data

We will use the information we have about our supporters to understand trends in donor behaviour to inform our decisions for future fundraising. Our ability to analyse this information is key to the future success of the Charity, and is a key objective for our Strategy.

We Will:

- Maximise opportunity to build engagement with supporters through robust data management, cultivation of donors and relationship building.
- Grow supporters year on year, and maximise data gathering opportunities, whilst keeping our supporters' information safe, in line with regulation
- Being data-driven, and proactive with our information to support decision making for future campaigns
- Utilising the recent NHS Charities Together development grant to improve our capacity and capability to maximise the use of our database and donor support



Objective 5 - Delivering Best Value and Measuring Impact

A key objective of this Strategy is to build the trust and confidence of our supporters, to show that we are doing the best we can with the money we have raised. In addition to celebrating our achievements, we will strive to be better, more efficient and have a lasting impact, benefitting not only the patients and their families who are cared for here at WUTH, but also our 6,500 committed WUTH members of staff.

We Will:

- Review and improve the fundraising grant application processes for different levels of funding from the charity to ensure they are managed in the most effective way
- Build a more robust link to Trust governance processes to ensure oversight and approval of charitable expenditure that is aligned to our Trust priorities
- Measure impact, celebrate and promote charity achievements with staff, supporters and the wider Wirral community to be a transparent and trusted local Charity of choice.
- Enhance financial reporting for cost-effective fundraising to understand how we can optimise our efforts and to support future planning

Strategic Alignment

Our Charity Strategic Objectives Aligned to our 2021-2026 Trust Strategic Objectives



	Outstanding Care <i>Provide the best care and support</i>	Compassionate workforce <i>Be a great place to work</i>	Continuous Improvement <i>Maximise our potential to improve and deliver best value</i>	Our Partners <i>Provide seamless care working with our partners</i>	Digital Future <i>Be a digital pioneer and centre for digital excellence</i>	Infrastructure <i>Improve our infrastructure and how we use it</i>
1 - Improving Awareness and Visibility			✓	✓	✓	✓
2 - Generating Income	✓		✓	✓	✓	
3 - Staff Awareness and Involvement		✓	✓			
4 - Donor Stewardship & Database Management				✓	✓	
5 - Delivering Best Value and Measuring Impact	✓	✓	✓	✓	✓	✓

Next Steps

How we Get to Where we Want to Be: Implementation, Monitoring and Review



Step 1

Development and sign-off of the Three Year Charity Strategy aligned to the Trust Strategic Objectives, and translated into the annual plan and operating model for the Charity.

Step 2

Key performance indicators for Our Charity Strategy will be set against each of our strategic objectives and priorities, and will include financial performance, engagement and impact.

Step 3

Key to the success of this Strategy is increasing income for the charity and investing in the Trust priority projects.

Step 4

Charity Strategy priorities will be reviewed as part of annual operational and strategic planning to ensure they remain relevant to our evolving patient needs and maintain delivery momentum.



Registered charity number 1050469

