



PWYLLGOR CRONFA ELUSENNOL CHARITABLE FUNDS COMMITTEE

DYDDIAD Y CYFARFOD: DATE OF MEETING:	15 March 2022
TEITL YR ADRODDIAD: TITLE OF REPORT:	Hywel Dda Health Charities Integrated Performance Report
CYFARWYDDWR ARWEINIOL: LEAD DIRECTOR:	Mandy Rayani, Director of Nursing, Quality and Patient Experience
SWYDDOG ADRODD: REPORTING OFFICER:	Nerys Thomas, Senior Finance Business Partner Nicola Llewelyn, Head of Hywel Dda Health Charities

Pwrpas yr Adroddiad (dewiswch fel yn addas)

Purpose of the Report (select as appropriate)

Ar Gyfer Penderfyniad/For Decision

ADRODDIAD SCAA SBAR REPORT

Sefyllfa / Situation

This report provides the Charitable Funds Committee (CFC) with an integrated picture of Hywel Dda Health Charities' performance and position as at 31st January 2022.

Cefndir / Background

The accompanying report attached at Annex 1, provides the CFC, on behalf of the Corporate Trustee, with an integrated picture of Hywel Dda Health Charities' performance.

The report is intended to provide the CFC with key financial information, in addition to a summary of activities and key achievements in line with the objectives of the charity's approved three-year plan.

Asesiad / Assessment

Hywel Dda Health Charities' financial performance is summarised in the main body of the report. The key financial performance considerations are:

1. The **net assets** of the charity have decreased by **£810,873** for the period ending 31st January 2022.
2. Total **incoming resources** up to 31st January 2022 were **£612,424** of which:
 - **£456,250** related to **donations and fundraising income**, a **decrease of 32.2%** in comparison to previous year income for the same period.
 - **£92,672** related to **legacy income**, a **decrease of 88.4%** in comparison to previous year income for the same period.
 - **£2,000** related to **grant income**, a **decrease of 99.2%** in comparison to previous year income for the same period.

- **£59,498** related to **investment income** (endowment only), a **decrease of 2.5%** in comparison to previous year income for the same period.
 - **£2,004** related to **income from other trading activities**. This was the profit generated by the lottery for the period 20th September to 31st December 2021.
3. The charity's **overall income from donations, grants and legacies** to 31st January 2022 has **decreased by 68.3%** in comparison to previous year income for the same period.
 4. The **value of investments** held by the charity as at 31st January 2022 was **£9,078,880**. The **value of total funds** held at the same date was **£9,811,110**. The charity's investment advisors Sarasin & Partners LLP report that the portfolios have performed below the index-based benchmark over the past quarter.
 5. **Realised and unrealised gains** on **investment assets** (endowment only) amount to **£162,593** as at 31st January 2022, a **decrease of 58.9%** in comparison to previous year gains.
 6. The **balances** of the charity **bank accounts** as at 31st January 2022 were: **current account £1,884** and **deposit account £3,013,436**.
 7. **Charitable expenditure** excluding support costs for the period 1st April 2021 to 31st January 2022 was **£1,413,475** which represents a **92.1% increase** in comparison to expenditure for the previous financial year.
 8. The reported position for the total of **governance and support costs** (including finance and fundraising costs) incurred up to 31st January 2022 is **£351,250**; an **underspend of £3,621** against budget.
 9. There is a **net surplus** from **unrestricted apportionments** across funds of **£109,283** for the period ending 31st January 2022, which is **sufficient to cover the governance and support costs** and audit fees incurred by the charity.

In addition to the statement of financial activity for the period ending 31st January 2022 at Appendix 1, further considerations for the CFC to note are the updates provided within the report at Annex 1 regarding:

- Investment performance (Appendix 2).
- Material commitments to 31st January 2022 (Appendix 3).
- Expenditure over £5,000 for the period October 2021 to January 2022 (Appendix 4).
- Update on the BGH Chemotherapy Day Unit Capital Fundraising Appeal (Appendix 5).

Governance and support costs

In March 2021, the Committee approved a governance and support costs budget of £425,845 for 2021/22, in line with the previous year's budget to provide the resources required to deliver the charity's three-year plan.

For the year to 31st January 2022, the reported position for the total of finance and fundraising costs is an underspend of £3,621 against budget, as per the table at figure 4 provided within the report at Annex 1.

For the 2022/23 financial year, the Committee is requested to consider and recommend for ratification by the Corporate Trustee a similar level of investment in the charity; a governance and support costs budget of £441,969. This budget is in line with the approved budget for 2021/22, allowing for a 4% inflation increase for pay costs and 2% inflation for non-pay costs.

In March 2021, the Committee also approved an additional marketing and communications pay budget of £37,500. This budget has not been utilised during 2021/22 and the Committee is requested to approve that this budget is carried forward to 2022/23 to fund the costs of a fixed-term Communications Assistant to support the newly appointed Senior Communications Officer and the implementation of the charity's marketing and communications objectives.

Argymhelliad / Recommendation

The Charitable Funds Committee is requested to:

1. **NOTE** the content of this report and receive **ASSURANCE** on the charity's performance.
2. **CONSIDER** and **RECOMMEND FOR RATIFICATION BY THE CORPORATE TRUSTEE** a governance and support costs budget of £441,969 for the 2022/23 financial year.
3. **CONSIDER** and **APPROVE** the carrying forward of the £37,500 marketing and communications pay budget approved in March 2021 to the 2022/23 financial year to fund the costs of a fixed-term Communications Assistant.

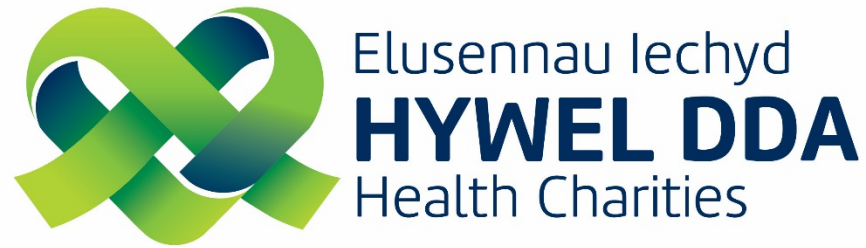
Amcanion: (rhaid cwblhau)

Objectives: (must be completed)

Committee ToR Reference: Cyfeirnod Cylch Gorchwyl y Pwyllgor:	4.1 Within the budget, priorities and spending criteria determined by the UB as trustee, and consistent with the requirements of the Charities Act 2011 (or any modification of these acts), to apply the charitable funds in accordance with its respective governing documents.
Cyfeirnod Cofrestr Risg Datix a Sgôr Cyfredol: Datix Risk Register Reference and Score:	Risk reference: 1130 Failure to increase charitable funds income and expenditure (planning objective 2E)
Safon(au) Gofal ac Iechyd: Health and Care Standard(s):	Governance, Leadership and Accountability
Amcanion Strategol y BIP: UHB Strategic Objectives:	Not Applicable
Amcanion Llesiant BIP: UHB Well-being Objectives: Hyperlink to HDdUHB Well-being Objectives Annual Report 2018-2019	10. Not Applicable

Gwybodaeth Ychwanegol: Further Information:	
Ar sail tystiolaeth: Evidence Base:	Ledger reports and investment reports.
Rhestr Termau: Glossary of Terms:	Included within the body of the report.
Partion / Pwyllgorau â ymgynhorwyd ymlaen llaw y Pwyllgor Cronfa Elusennol: Parties / Committees consulted prior to Charitable Funds Committee:	Director of Finance Fundraising Team

Effaith: (rhaid cwblhau) Impact: (must be completed)	
Ariannol / Gwerth am Arian: Financial / Service:	The report sets out the financial position of the charity. Income generated from fundraising activities is a key source of income for Hywel Dda Health Charities. The charity is therefore duty bound to ensure that the correct controls and governance arrangements exist with regards to all aspects of fundraising.
Ansawdd / Gofal Claf: Quality / Patient Care:	Charity objects are in support of NHS services locally.
Gweithlu: Workforce:	Governance and support costs included in Section 4.2 of Annex 1.
Risg: Risk:	Reputational risk if associated with unethical fundraising.
Cyfreithiol: Legal:	The charity's financial reporting is in line with charity law and guidance.
Enw Da: Reputational:	Reputational risk if associated with unethical fundraising.
Gyfrinachedd: Privacy:	No impact.
Cydraddoldeb: Equality:	No EqIA is considered necessary for a paper of this type.



Integrated Performance Report

**Position as at
31st January 2022**



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1. Introduction

This report provides the Charitable Funds Committee (CFC), on behalf of the Corporate Trustee, with an integrated picture of performance of Hywel Dda Health Charities.

The report is intended to provide the CFC with key financial information as well as a summary of activities and key achievements in line with the objectives of the charity's approved three-year plan.

2. Summary of Key Financial Activity

2.1 The **net assets** of the charity have decreased by **£810,873** for the period ending 31st January 2022 (see Appendix 1).

2.2 Total **incoming resources** to 31st January 2022 (See Appendix 1) were **£612,424** of which:

- **£456,250** related to **donations and fundraising income**, a **decrease of 32.2%** in comparison to previous year income for the same period.
- **£92,672** related to **legacy income**, a **decrease of 88.4%** in comparison to previous year income for the same period.
- **£2,000** related to **grant income**, a **decrease of 99.2%** in comparison to previous year income for the same period.
- **£59,498** related to **investment income** (endowment only), a **decrease of 2.5%** in comparison to previous year income for the same period.
- **£2,004** related to **income from other trading activities**. This was the profit generated by the lottery for the period 20th September to 31st December 2021.

2.3 The charity's **overall income from donations, grants and legacies** to 31st January 2022 has **decreased by 68.3%** in comparison to previous year income for the same period.

2.4 The **value of investments** held by the charity as at 31st January 2022 was **£9,078,880**. The **value of total funds** held at the same date was **£9,811,110**. Our investment advisors Sarasin & Partners LLP report that our portfolios have performed below the index-based benchmark over the past quarter.

- 2.5 **Realised and unrealised gains** on **investment assets** (endowment only) amount to **£162,593** as at 31st January 2022, a **decrease of 58.9%** in comparison to previous year gains (See Appendix 1).
- 2.6 The **balances** of our charity **bank accounts** as at 31st January 2022 were: **current account £1,884** and **deposit account £3,013,436**.
- 2.7 Our **charitable expenditure** excluding support costs for the period 1st April 2021 to 31st January 2022 was **£1,413,475** which represents a **92.1% increase** in comparison to expenditure for the previous financial year. (See Appendix 1).
- 2.8 The reported position for the total of **governance and support costs** (including finance and fundraising costs) incurred to 31st January 2022 is **£351,250**; an **underspend of £3,621** against budget.
- 2.9 There is a **net surplus** from **unrestricted apportionments** (after investment gains) across funds of **£109,283** for the period ending 31st January 2022, which is **sufficient to cover the governance and support costs** and audit fees incurred by the charity. (See section 4.1, figure 5).

Further information:

- The **statement of financial activity** for the period ending 31st January 2022 is included at **Appendix 1**.
- A summary of our **investment performance** for the period ending 31st January 2022 is included at **Appendix 2**.
- Details of material commitments (approved by the CFC) as at period ending 31st January 2022 is included at **Appendix 3**.
- Details of the charity's **expenditure over £5,000** to 31st January 2022 is included at **Appendix 4**.

3. Our Income

Objective: Increase our income levels by 10% on an annual basis from April 2020 to July 2023

Figure 1: Rolling annual donation figures by county from January 2021 to January 2022

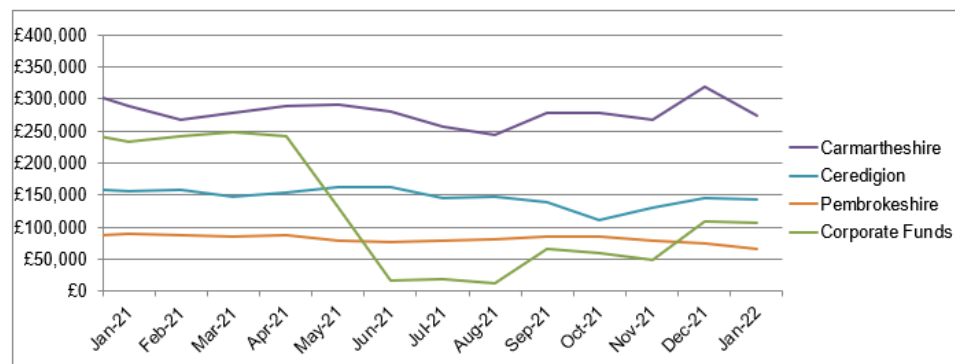
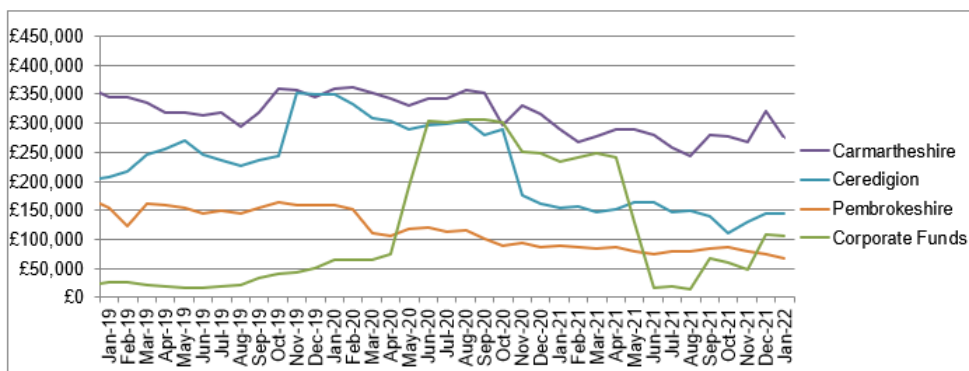


Figure 2: Rolling annual donation figures by county from January 2019 to January 2022



4. Our Expenditure

- The charity's overall income from donations, grants and legacies to 31st January 2022 has decreased by 68.3% in comparison to income received for the same period in the previous financial year. This can be attributed to:
 - Donations and fundraising: significant impact of the pandemic on community fundraising and mass participation events. The decrease of 32.2% is however below the average decrease currently being experienced by NHS charities.
 - Grants: the significant level of grant funding received from NHS Charities Together in 2020/21 (£485,000).
 - Legacies: significant delays at probate as well as the unpredictability of this income source. The decrease of 88.4% was however not predicted given the charity's average income from legacies over the last five financial years is £706,000.
- As the charity's income increased by 20.75% during 2020/21 and remained above the national UK levels of average charitable giving, a decrease in income during 2021/22 was to be expected. It is envisaged that the charity may experience further reductions in income due to the ongoing impact of the pandemic coupled with the increasing pressures on households as the cost of living rises.
- Every effort is however being made to stabilise income levels through the delivery of the key phases of the 2E planning objective's plan on a page for (item 2.4). Progress will be reported on to the CFC on a quarterly basis as well as via the charitable funds risk (ref. 1130) which will also monitor the charity's performance in relation to income levels.
- £162,593 related to investment income (endowment only), a decrease of 58.9% in comparison to previous year income for the same period. This was due to weaker market performance in the first 9 months of 2021.
- An update on the capital fundraising appeal for the Bronglais General Hospital Chemotherapy Day Unit can be found at Appendix 5.

Objective: Increase our charitable expenditure by 15% on an annual basis from April 2020 to July 2023

Figure 3: Charitable expenditure to 31st January 2022

Expenditure	2019-20 (£)	2020-21 (£)	As at 31st January 2022	
			2021-22 (£)	2021-22 %
Support costs	97,372	99,993	84,844	5.7
Medical and surgical equipment	480,453	403,844	147,914	9.9
Office and computer equipment	290,121	183,304	41,413	2.8
Building and refurbishment	1,390,282	5,941	690,078	46.1
Staff education/ welfare	90,187	39,158	221,550	14.8
Patient education/ welfare	85,313	88,712	306,852	20.5
Miscellaneous	151,189	216,134	5,668	0.4
Total (£)	2,584,917	1,037,086	1,498,319	100.0

- Charitable expenditure to 31st January 2022 including support costs was £1,498,319, which represents an 0.83% increase in comparison to expenditure for the same period in the previous financial year.
- This can be attributed to the higher level of spend committed against building and refurbishment works, largely due to the development of the BGH Chemotherapy Day Unit (£671,000); a commitment of £181,000 towards creating rest areas for staff across HDdUHB; increased levels of medical device purchases; and actual and committed clinical staff costs in relation to approved patient care projects namely (e.g. CaPS, Haematology Trainee Clinical Nurse Specialists).

- Charitable expenditure for Christmas 2021 was within the maximum allocation of £20,000 approved by the Committee in November 2021. The expenditure was welcomed by colleagues across HDdUHB and helped to improve the experience for patients, services users and staff. As with previous years, any unspent gift cards from the Christmas monies process will be utilised by the Patient Experience team to purchase items such as emergency toiletries, nightwear or clothing for patients and distraction items.
- Due to the complexity of the automated process for expenditure authorisations, the development of the online application form has taken longer than expected. The Digital Improvement Team is undertaking further work on the approval workflow and it is likely that a move to an alternative online platform is required to ensure that the new application process is both user-friendly and meets audit requirements. A 'test' electronic application form will be piloted in March 2022, prior to launch during quarter 1 2022/23.
- A review of the charitable funds expenditure guidance for staff and fund managers has been undertaken. New, user-friendly guidance documents will be launched at the same time as the new electronic application form to make it as easy as possible for staff to access our funds.

4.1 Governance and Support Costs

Figure 4: Finance and fundraising costs to 31st January 2022

	Approved annual budget 2021-22 £	Budget to 31/01/22 £	Actual Costs to 31/01/22 £	(Under) / Over budget to 31/01/22 £
Finance	92,813	77,344	77,344	0
Fundraising	333,032	277,527	273,906	(3,621)
Total	425,845	354,871	351,250	(3,621)

Figure 5: Investment income, returns and charges to 31st January 2022

- In March 2021, the Committee approved a governance and support costs budget of £425,845 for 2021/22, in line with the previous year's budget to provide the resources required to deliver the charity's three-year plan.
- For the year to 31st January 2022, the reported position for the total of finance and fundraising costs is an underspend of £3,621 against budget, as per the table at figure 4.
- The table at figure 5 depicts all investment income, returns and charges apportioned across funds for the period ending 31st January 2022. There is a net surplus from unrestricted apportionments of £109,283. The unrestricted funds surplus is sufficient to cover the governance and support costs and audit fees incurred by the charity.
- The Committee is asked to consider and approve a governance & support costs budget of £441,969 for 2022/23. This represents a 4% inflation increase for pay costs and 2% inflation for non-pay costs.
- In March 2021, the Committee also approved an additional marketing and communications pay budget of £37,500. This budget has not been utilised during 2021/22 and the Committee is requested to approve that this budget is carried forward to 2022/23 to cover the costs of a Communications Assistant, recruited on an 18-month fixed-term basis from December 2021, to support the implementation of the marketing and communications objectives. 2021/22 employment costs for the Communications Assistant are included in figure 4 (actual costs to 31/01/22).

	Restricted Funds (£)	Unrestricted Funds (£)	Endowment Funds (£)	Overall Total (£)
Investment Income	(93,015)	(81,598)	(59,352)	(233,965)
Governance & Support - Finance, Fundraising & Support Team	187,108	164,142	0	351,250
Investment Management Fees	14,314	12,557	9,821	36,693
Audit Fees	3,995	3,505	0	7,500
Investment Gains & Losses	(236,976)	(207,888)	(162,593)	(607,457)
(Surplus) / Deficit	(124,574)	(109,283)	(212,123)	(445,980)

For clarity on the nature of dividends and interest earned by 'unrestricted', 'restricted' and 'endowment' funds, these can be defined as follows:

- Unrestricted and restricted funds – income earned from surplus cash from general restricted funds invested with Sarasin & Partners LLP. The income earned is apportioned against all unrestricted and restricted funds based on an average fund balance across the whole year.
- Endowment funds – income earned from an investment where the capital cannot be spent, and that income earned is to be used for a specific purpose and is therefore restricted and will not be generally apportioned across all funds.

Appendix 1: Statement of Financial Activity for the Period Ending 31st January 2022

HYWEL DDA LOCAL HEALTH BOARD CHARITABLE FUND REPORT - SUMMARY FOR THE PERIOD ENDING 31 JANUARY 2022							
	Corporate	Acute Services	Carmarthen Community	Ceredigion Community	Pembrokeshire Community	Mental Health & Learning Disabilities	Total
	£	£	£	£			£
Incoming resources							
Donations	25,574	368,674	37,076	11,648	4,604	8,672	456,250
Legacies	0	91,446	226	0	1,000	0	92,672
Grants receivable	0	0	0	0	0	2,000	2,000
Investment income	0	59,498	0	0	0	0	59,498
Income from other trading activities	2,004	0	0	0	0	0	2,004
Other incoming resources	0	0	0	0	0	0	0
	27,578	519,619	37,302	11,648	5,604	10,672	612,424
Resources expended							
Expenditure on raising funds	0	0	0	0	0	0	0
Charitable activities	(244,232)	(1,142,966)	(6,360)	443	(18,786)	(1,574)	(1,413,475)
Governance costs	0	0	0	0	0	0	0
Support costs	0	0	0	0	0	0	0
Investment Management	0	(9,821)	0	0	0	0	(9,821)
	(244,232)	(1,152,787)	(6,360)	443	(18,786)	(1,574)	(1,423,297)
Net incoming/(outgoing) resources before transfers	(216,654)	(633,169)	30,942	12,091	(13,181)	9,098	(810,873)
Gross transfers between funds	0	0	0	0	0	0	0
Net incoming/(outgoing) resources	(216,654)	(633,169)	30,942	12,091	(13,181)	9,098	(810,873)
Gains/(losses) on investment assets							
Realised and Unrealised	0	162,593	0	0	0	0	162,593
Net movement in funds	(216,654)	(470,576)	30,942	12,091	(13,181)	9,098	(648,280)
Opening balance at 1 April 2021	1,167,498	8,231,524	496,527	207,646	148,328	207,868	10,459,390
Closing balance at 31 January 2022	950,843	7,760,948	527,470	219,737	135,146	216,966	9,811,110

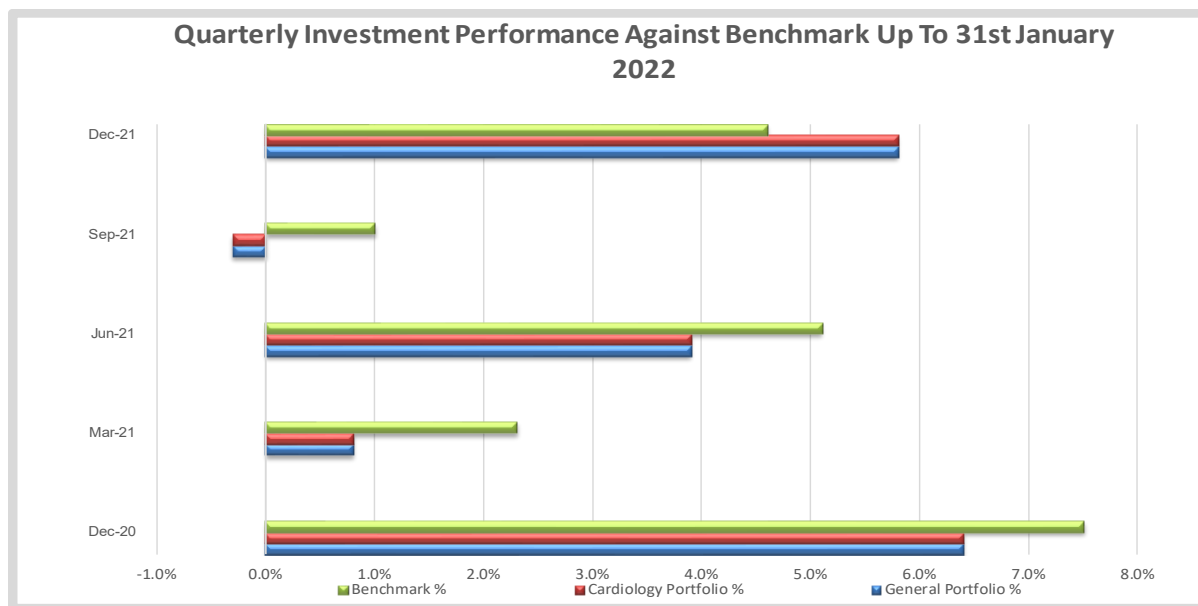
Appendix 2: Investment Performance

On 31st January 2022, the value of investments held by the charity was £9,078,880. The value of total funds held at the same date was £9,811,110.

Funds are separated into two areas. Firstly, a fund tied to the permanent endowment fund for Pembrokeshire Cardiology Equipment of £2,430,065 and secondly a general charity fund of £6,648,815.

The first nine months of 2021 proved to be a relatively difficult period after a strong 2020. Performance was stronger over the final quarter of 2021, with our portfolios producing a total return, net of fees, of +5.8% against the benchmark of +4.6%. While this has not negated the weaker performance earlier in the year. As long-term investors there will be short periods of underperformance; nevertheless, future returns are looking promising where the 3 and 5 year numbers, after all costs, remain ahead of the benchmark and ARC Peer Group.

To conclude Sarasin & Partners LLP advise there may be further short-term volatility; however, they have confidence in their core themes which in turn should generate sufficient free cashflow to support divined growth in excess of inflation over the longer term.



Portfolio benchmark (from 1-Jul-21): ICE BofAML Sterling Corporate (7.5%), ICE BofAML UK Gilts All Stocks (7.5%), MSCI AC World ex UK (Local Currency) (GBP) (10%), MSCI AC World ex UK (Net Total Return) (40%), MSCI All Balanced Property Funds - One Quarter Lagged (5%), MSCI UK IMI (Net Return) GBP (20%), 2% per annum above SONIA (alternative assets) (10%).

Peer Group: The WM Charity Index was discontinued from March 2016. The peer group performance data used is the ARC Steady Growth Charity Index (further details within the Glossary) which could include an ARC estimate for the most recent period. Performance is calculated 'net' of Sarasin's investment management fees, using Bid prices. This takes into account receipts to and withdrawals from the portfolio during the period, and their dates. Prices are sourced from Bloomberg.

All volatility figures measure the standard deviation of the monthly returns over the period and are annualised for periods over 1 year. This is not the only method of calculating volatility and other methods may produce different results.

Appendix 3: Material Commitments at 31st January 2022 (approved by CFC)

Service	£	Description	Date Approved	Status
Cancer Service - Ceredigion	259,977.00	BGH Chemotherapy Development	2015	Re-committed to the development in September 2019.
Cancer Service - Pembrokeshire	158,421.00	Ward 10 Enhanced Scheme	Sep-19	Active Spend on Roof top Terrace - approved expenditure plan.
Cancer Service - Ceredigion	259,977.00	BGH Chemotherapy Development	Sep-19	Approved as contribution to the development in September 2019
Cancer Service - Ceredigion	97,364.29	BGH Chemotherapy Development	Jun-21	Approved additional contribution towards the BGH Chemotherapy development.
Cancer Service - Ceredigion	173,936.80	BGH Chemotherapy Development	Jun-21	
Cancer Service - Ceredigion	400,000.00	BGH Chemotherapy Development	Jun-21	
Cancer Service - Ceredigion	4,538.86	Cancer Psychological Support Pilot Project 2 years	Mar-18	Reducing balance - monthly recharges transacted in 2021-22 to support staff costs.
Cancer Service - Pembrokeshire	8,421.26	Cancer Psychological Support Pilot Project 2 years	Mar-18	
Cancer Service - Glangwili	10,592.02	Cancer Psychological Support Pilot Project 2 years	Mar-18	
Cancer Service - Prince Philip	9,341.52	Cancer Psychological Support Pilot Project 2 years	Mar-18	
Unscheduled Care - Ceredigion	5,000.00	Funding of Trainee Clinical Nurse Specialist Post	Sep-20	Agreed via CFC Meeting 15th September 2020 - pandemic caused a delay in appointments. Start date for one applicant April 2022.
Unscheduled Care - Pembrokeshire	5,000.00	Funding of Trainee Clinical Nurse Specialist Post	Sep-20	
Cancer Service - Ceredigion	67,819.00	Funding of Trainee Clinical Nurse Specialist Post	Sep-20	
Cancer Service - Pembrokeshire	31,409.00	Funding of Trainee Clinical Nurse Specialist Post	Sep-20	
Unscheduled Care - Prince Philip	39,054.00	Mynydd Mawr Garden Project		Agreed via Sub Committee - Form CF1750
Corporate - Paediatric Palliative Care	55,996.00	Family Counsellor Proposal for Paediatric Palliative Care	Sep-21	Charitable Funds Committee Approved - (Sept 2021 CFC)
Corporate	180,941.00	Staff Welfare & Wellbeing	Nov-21	Charitable Funds Committee Approved - (Nov 2021 CFC)
Cancer Service - Glangwili	86,800.00	Haemodynamic Monitoring Equipment	Nov-21	Charitable Funds Committee Approved - (Nov 2021 CFC)
Cancer Service - Glangwili	228,000.00	Cancer Psychological Support Pilot Project (22-25)	Nov-21	Charitable Funds Committee Approved - (Nov 2021 CFC)

Appendix 4: Expenditure Over £5,000 for the Period October 2021 to January 2022

Service	Fund Name	£	Description	Claim Ref
Unscheduled Care	T900-Withybush Hospital Fund	7,220.75	SWISS DOLORCLAST SMART 20 SHOCKWAVE SYSTEM	CF02129
Unscheduled Care	T718-PPH Rehabilitation	6,454.00	SARA PLUSE SCALE	CF02114
Unscheduled Care	T718-PPH Rehabilitation	5,156.00	MAC 2000 ECG MACHINE	CF02112
Unscheduled Care	T862-Ceredigion - General Medicine	5,156.00	MAC 2000 ECG MACHINE	CF02119
Unscheduled Care	T862-Ceredigion - General Medicine	5,156.00	MAC 2000 ECG MACHINE	CF02118



Hywel Dda Health Charities

Bronglais Chemo Appeal

Position to 25th February 2022



1. Successful launch of appeal on 30th November 2021





2. Income to 25th February 2022

Income source	Overall target £	Target £ Nov 2021 to March 2022	Progress £ to 25 th Feb 2022	% of overall target
Community fundraising	£205,000	£45,000	£32,252	15.73%
Trusts and foundations	£135,000	£5,000	£0	0%
Individual giving	£85,000	£20,000	£15,829	18.62%
Corporate	£30,000	£3,500	£3,175	10.2%
Events	£25,000	£0.00	£218.00	0.87%
Major donors	£20,000	£5,000	£5,000	25%
Total	£500,000	£78,500	£56,474	11.3%



3. Key achievements

- Dedicated web pages and online donations/fundraising page
- Media partnership with The Cambrian News
- Over 80 media features and news articles across the region
- Staff engagement: monthly newsletter for HDdUHB cancer services staff
- Appeal-specific donor recognition and stewardship programme
- Distribution of appeal-specific collection boxes
- Partnerships with several local sporting events including Silver Trail Half Marathon and Aberystwyth Cycle Festival





4. Key priorities March to June 2022

- Applications to grant-making trusts and foundations
- Planning of cancer services staff-led charity walk for June 2022
- Developing a 'case for support' for potential corporate supporters
- Filming of patient, staff and fundraiser case studies
- Direct mail campaigns

