



# 2025-26 Management Plan

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# 2025-26 MANAGEMENT PLAN Version 1.0 Completed Objectives as at 13-03-2026

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## Our Strategic Priorities and Objectives

Our work is centred around the needs of patients and those important to them. We are committed to building on our achievements and strong reputation for providing exceptional care to those in our community who need our support.

We have outlined four key strategic priorities that together will expand access to support and care for our patients and those important to them, while also ensuring our long-term sustainability. These priorities reflect our commitment to securing essential funding, strengthening community support, and promoting the wellbeing of our dedicated staff and volunteers, whose resilience and compassion are vital to everything that we deliver.

The four key strategic priorities are

1. *Our Care: Maximizing Our Impact and Quality*
2. *Our People: Empowering Our Staff and Volunteers to Excel*
3. *Our Community: Championing our Vital Role*
4. *Our Funding: Securing a Sustainable Future*

The pursuit and delivery of our priorities is enabled by the objectives that each department sets out each year in the Management Plan. This document provides details of those priority objective and provides opportunity to map their progress over the year. As such, this management plan is a living document and should be updated as and when progress toward the objectives changes.

Objectives are set out to support the work and drive of each department and their update should feed into the governance committees that in turn report into and provide assurance to the Hospice's Board of Trustees.

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### 1. Strategic - Exec

	Strategic Pillar(s)	Area of Development	What will we do?	How will we know? / KPI	Lead	Target Date	KLOE	RAG	Notes
1.1	Our Care Our Funding	Engage with SWL ICB over future service developments and Funding	<ul style="list-style-type: none"> <li>Work collaboratively with other SWL Hospices</li> <li>Engage with SWL ICB over funding and re-modelling activity for EoLPC services</li> </ul>	<ul style="list-style-type: none"> <li>Improved Funding from SWL ICB</li> <li>Improved collaboration</li> <li>Participated in and voice heard in SWL re-modelling exercise</li> </ul>	NS/RT	Mar 2026	Well Led		<ul style="list-style-type: none"> <li>Local Hospice CEOs working together to seek a better settlement from SWL ICB</li> <li>Funding is at 30% of direct care costs</li> </ul>

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### 2. Corporate Governance

	Strategic Pillar(s)	Area of Development	What will we do?	How will we know?	Lead	Target Date	KLOE	RAG	Notes
2.1	Our Care	Information Governance	Progress and maintain compliance with the NHS Data Security & Protection Toolkit	<ul style="list-style-type: none"> <li>DS&amp;P toolkit publication</li> </ul>	AR	June 2025	Well-led Effective Safe		Complete
2.2	Our Care	Quality Account	Revise and publish Quality Account annually	<ul style="list-style-type: none"> <li>2024/25 QA published to website</li> </ul>	AR	July 2025	Well-led Effective		Published
2.3	Our Care Our People	Policies and Procedures	Review, revise and maintain SRH policies to ensure accuracy, evidence of review and use of the standard policy template.	<ul style="list-style-type: none"> <li>Corporate Governance Report to Board of Trustees</li> </ul>	AR/ Review leads	Mar-2026 /Ongoing	Safe Effective Responsive Well-led		<ul style="list-style-type: none"> <li>Compliance rates in 2025/26 are:- May 2025 – 86% Jun 2025 – 87% Oct 2025 – 89% Jan 2026 – 87%</li> </ul>
2.4	Our Care Our People	Mandatory Training	Provide regular compliance report across mandatory training topics to the Training & Development Committee (T&DC)	Minutes of T&DC	MF/KC	Mar-2026 / Ongoing	Safe Effective Well-led		
2.5	Our Care	Care Quality Commission	<ul style="list-style-type: none"> <li>To undertake annual review of the KLOE self-assessment document to ensure it is up to date.</li> </ul>	KLOE self – assessment.  Update to the CQ&G Sub via the Clinical Quality and Governance Report	RT/ AR/ Cons Lead	Mar-2026 /Ongoing	Well-led		<ul style="list-style-type: none"> <li>KLOE update review meetings on-going</li> </ul>

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### 3. Clinical Quality & Governance

	<i>Strategic Pillar(s)</i>	<i>Area of Development</i>	<i>What will we do?</i>	<i>How will we know?</i>	<i>Lead(s)</i>	<i>Target Date</i>	<i>KLOE</i>	<i>RAG</i>	<i>Notes</i>
3.1	Our Care	Clinical Audit/Quality Improvement & Research	<ul style="list-style-type: none"> <li>Produce and maintain an audit/monitoring/research project schedule 2024/25</li> </ul>	<ul style="list-style-type: none"> <li>CQ &amp; G Minutes</li> <li>Audit report library</li> <li>Audit progress/results summary report</li> <li><u>Clinical Audit Program &amp; Timeline</u></li> </ul>	AR/GTR	Jun 2025	Well-led Effective Safe Caring Responsive		<ul style="list-style-type: none"> <li><a href="#">2025-26</a></li> </ul>
3.2*	Our Care Our People Our Community	Outpatients	Launch and embed an Outpatient Clinic for community patients at the main Hospice	Operational clinics	Loc LeadsK H HS KW	Mar 2026	Well-led Effective Safe Caring Responsive		KPI : 2 clinics per month; 20 patients seen by Dec 2025 ; 80% attendance based on offer (excl. DNA due to AKPS/PoI)
3.3	Our Care Our Community	Strategic relationships with HC partners / neighbouring Hospices	<p>Schedule quarterly engagement meetings (ie. Merton Huddle, EoLC steering groups, consider Sutton Huddle)</p> <p>Share impact data (e.g. reduced admissions, preferred PoD, referrals)</p> <p>Participate in working groups on system transformation</p>	Engagement meetings / impact data and participation feedback	Loc LeadsK H HS KW	Mar 2026	Well-led Effective Safe Caring Responsive		<p>KPI : One joint initiative underway by year end (i.e. Sutton Huddle)</p> <p>SRH rep (BT / GTR) on Sutton and Merton Provider Alliance</p> <p>CHC Fast Track Project (Jan-Mar 2026)</p>

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	<b>Strategic Pillar(s)</b>	<b>Area of Development</b>	<b>What will we do?</b>	<b>How will we know?</b>	<b>Lead(s)</b>	<b>Target Date</b>	<b>KLOE</b>	<b>RAG</b>	<b>Notes</b>
3.4*	Our Care Our Community	Equity of Access for Hard to Reach Groups	<p>Ensure equitable access to hospice services for underrepresented or vulnerable populations.</p> <p>Improve staff awareness and competence in delivering inclusive, person-centred care through reflection and complex M+M</p> <p>Strengthen collaboration with healthcare partners who support marginalised groups.</p>	<p>Collect and report on referrals involving:</p> <ul style="list-style-type: none"> <li>▪ People with learning disabilities</li> <li>▪ Prison population</li> <li>▪ Homeless individuals</li> <li>▪ Young adults transitioning from children’s services.</li> <li>▪ BAME</li> <li>▪ Travelling Community</li> </ul> <p>Identify a Learning Disability Champion within the team</p> <p>Attendance to LeDeR meetings to contribute to learning and service improvement.</p> <p>Staff education i.e. Oliver Mc Gowan /MCA mandatory training external study opportunities</p> <p>Develop and maintain professional relationships with key healthcare and community partners supporting these groups.</p> <p>Have useful resources available for staff</p>	Loc Leads KH HS KW	Mar 2026	Well-led Effective Safe Caring Responsive		<p>KPIs : Ongoing monitoring of referral data by demographic category (quarterly).</p> <ul style="list-style-type: none"> <li>• Appointment of Learning Disability Champion</li> <li>• Staff attendance at least one LeDeR meeting per quarter.</li> <li>• 100% compliance with Oliver McGowan and MCA training within 12 months.</li> <li>• At least one collaborative initiative or meeting twice a year with external partners focused on inclusion i.e. prison MDT / Transition of Young People</li> <li>• Staff awareness and confidence in supporting hard-to-reach groups</li> </ul>

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	<b>Strategic Pillar(s)</b>	<b>Area of Development</b>	<b>What will we do?</b>	<b>How will we know?</b>	<b>Lead(s)</b>	<b>Target Date</b>	<b>KLOE</b>	<b>RAG</b>	<b>Notes</b>
3.5	Our Care Our Community	Psychological Support Service Medical Team Education	Maintain provision of Bereavement Support Work to High down Prison as well as specialist palliative care psychotherapy to residents end of life.	Grant from the Linden Foundation secured March 2024. Project went live May 2024. Specialist psychotherapist already recruited. Project evaluation to funder will allow all targets to be evaluated and hopefully met.	NC/ DM / RT / DB / Education	Mar 2026	Caring Responsive		<ul style="list-style-type: none"> <li>• Psychotherapist introduced to prison staff 25.04.24.</li> <li>• Sessions with clients completed.</li> <li>• Education delivered</li> </ul>
3.6	Our Care	Infection Control	<p>Maintain a robust approach to Infection Control across clinical and non-clinical services</p> <ul style="list-style-type: none"> <li>• IPC link healthcare professionals supported to continue leading on audits</li> <li>• Maintenance of close working between Facilities, Housekeeping and clinical services</li> </ul>	<ul style="list-style-type: none"> <li>• Infection rates remain low across clinical areas and the organisation at large</li> <li>• Staff feel confident and competent in managing infection prevention and control in line with mandatory training information and Infection control policies</li> <li>• Relevant audits are undertaken in a timely manner and reflect best practice</li> </ul>	SM/RT	Mar 2026	Safe		<ul style="list-style-type: none"> <li>• Annual report to be published in Jan/Feb 2026</li> </ul>

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	<i>Strategic Pillar(s)</i>	<i>Area of Development</i>	<i>What will we do?</i>	<i>How will we know?</i>	<i>Lead(s)</i>	<i>Target Date</i>	<i>KLOE</i>	<i>RAG</i>	<i>Notes</i>
3.7	Our Care Our People	Psychological Support Services	Maintain student bereavement counsellor placements at 8	Continuation of reduced need for counselling by PS Lead.  Shorter waiting list	RT/PSS Team	Mar 2026	Well-led Effective Responsive		<ul style="list-style-type: none"> <li>• Student numbers currently at 10. Prospective applicants for the next academic year intake already lined up.</li> <li>• Waiting times to remain at less than 2 – 4 weeks.</li> </ul>
3.8	Our Care Our People Our Community	IPU staffing	Maintain an establishment that services the safe delivery of care for a 10 bed IPU and explore extending establishment to service CHC funded beds	<ul style="list-style-type: none"> <li>• Remain within the staffing budget</li> <li>• Predominantly working to a 10-bed availability</li> <li>• Explore viability of CHC funded bed provision</li> </ul>	RT/HD	Mar 2026	Well-led Effective Safe Responsive		<ul style="list-style-type: none"> <li>• Reduction of bank and agency use</li> <li>• CHC funded project Jan-Mar 2026d project Jan-Mar 2026</li> <li>• 12 hour shift system introduced</li> </ul>

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	<i>Strategic Pillar(s)</i>	<i>Area of Development</i>	<i>What will we do?</i>	<i>How will we know?</i>	<i>Lead(s)</i>	<i>Target Date</i>	<i>KLOE</i>	<i>RAG</i>	<i>Notes</i>
3.9	Our Care  Our People	IPU Admissions : Skillset and cover for the nursing team on the IPU	<ul style="list-style-type: none"> <li>• Staff ratio analysis</li> <li>• Working hours / shift patterns analysis</li> <li>• Sustain provision of a 10 bed IPU including the family suite appropriately staffed</li> <li>• A more responsive and active IPU</li> </ul>	<ul style="list-style-type: none"> <li>• Revised working patterns</li> <li>• Staff absence rate</li> <li>• Datix data demonstrates no increase in incidents/accidents that can be related to inadequate staffing numbers</li> <li>• Admissions/ Occupancy – IPU data dashboard</li> </ul>	RT / FQ	Mar-2026	Well-led Effective Safe Responsive		<ul style="list-style-type: none"> <li>• Twice daily admissions meetings</li> <li>• IPU acuity score utilised to help triage admission capacity</li> </ul>

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### 4. Education & Training

	Strategic Pillar(s)	Area of Development	What will we do?	How will we know?	Lead(s)	Target Date	KLOE	RAG	Notes
4.1	Our Care Our People	Education and training - external	Engagement with external stakeholders to support unmet needs in EoLC training	<ul style="list-style-type: none"> <li>• Offer a new portfolio of a minimum of 6 clinical education sessions for nursing home staff</li> <li>• Provision of communication skills training ranging from foundation to advanced level workshops for generalist to specialist internal and external staff</li> <li>• Provision Non-medical Prescriber updates for internal and external staff</li> <li>• Development of an education database to contact potential attendees, monitor engagement and grow awareness</li> <li>• Increase overall engagement in education sessions open to external candidates by 10%</li> </ul>	MF/KC	Mar 2026	Well led Effective Safe Responsive Caring		<p>VOED, CSCI, Sensitive Conversations/ACP</p> <p>ACST – 2 workshops per year; attendance 5-10 per workshop</p> <p>ACST refresher – annually; attendance 5-10</p> <p>2 sessions per year; achieve a minimum of 3 external attendees per session</p>

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	Strategic Pillar(s)	Area of Development	What will we do?	How will we know?	Lead(s)	Target Date	KLOE	RAG	Notes
4.2	Our Community	Community engagement	<ul style="list-style-type: none"> <li>Develop education which supports our community and their understanding of hospice care</li> </ul>	<ul style="list-style-type: none"> <li>Extending our reach to the Prison Service through provision of EOLC awareness sessions and resources</li> <li></li> </ul>	MF/KC	Mar 2026	Well led Effective Responsive Caring		Prisons – one session provided (19 prison staff attended); second session planned

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### 5. Health & Safety, Environment and Facilities

Ref. No	Strategic Pillar(s)	Area of Development	What will we do?	How will we know?	Lead(s)	Target Date	KLOE	RAG	Notes
5.1	Our Care	IPU Drug Store	<ul style="list-style-type: none"> <li>Renovation of IPU Drug Store.</li> </ul>	<ul style="list-style-type: none"> <li>Room completed and ready for use.</li> </ul>	JG/PM/FQ	Mar-2026	Well-led Effective Safe		Completed
5.2	Our People	IPU Changing Rooms	<ul style="list-style-type: none"> <li>Renovation of IPU Changing Rooms</li> </ul>	<ul style="list-style-type: none"> <li>Rooms completed and ready for use</li> </ul>	JG/PM/FQ	Mar-2026	Well-led Effective Safe		Completed
5.3	Our Community	IPU Mortuary	<ul style="list-style-type: none"> <li>Decommissioning and removal of the Mortuary</li> </ul>	<ul style="list-style-type: none"> <li>Space ready for creation of multi-faith area</li> </ul>	JG/PM/FQ	Mar-2026	Well-led Effective Safe		Completed
5.4	Our Care Our People	H&S: Risk Assessment Register	<ul style="list-style-type: none"> <li>Review and ensure RAs are reviewed within the past 2 years.</li> </ul>	<ul style="list-style-type: none"> <li>H&amp;S Minutes</li> </ul>	AR	Mar-2026	Safe Well-led Effective		<ul style="list-style-type: none"> <li>Reminder for completion within past 2 years routinely advised via HoDs</li> </ul>

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Ref. No	Strategic Pillar(s)	Area of Development	What will we do?	How will we know?	Lead(s)	Target Date	KLOE	RAG	Notes
5.5	Our Care Our People	H&S Workplace Audit	<ul style="list-style-type: none"> <li>Produce report following H&amp;S workplace audit</li> </ul>	<ul style="list-style-type: none"> <li>Workplace Health &amp; Safety Checklist Audit Report</li> </ul>	AR/JC	Mar-2026	Safe Well-led Effective		<ul style="list-style-type: none"> <li>2nd round audit for retail completed in May 2025.</li> <li>Main Hospice Audits compartmentalised with IPU completed in April 2025</li> <li>Roll out across Main Hospice is tasked for 2026/27</li> </ul>
5.6	Our Community Our People	H&S: Fire Doors	<ul style="list-style-type: none"> <li>Replace inadequate fire doors on IPU of main Hospice</li> </ul>	<ul style="list-style-type: none"> <li>All fire doors updated as required</li> </ul>	JG/PM	Mar-2026	Well-led Effective Safe		On-going for other areas of main Hospice—main clinical ward area complete.
5.7	Our Care Our People Our Community	Fire Risk Assessments	<ul style="list-style-type: none"> <li>Follow up action</li> </ul>	<ul style="list-style-type: none"> <li>H&amp;S Minutes</li> </ul>	PM/AR	Mar 2026	Well-led Effective Safe		Incorporated into Facilities Manager visits in 2026 - Ongoing

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### 6. Finance

Ref. No	Strategic Pillar(s)	Area of Development	What will we do?	How will we know? / KPI	Lead	Target Date	KLOE	RAG	Notes
6.1	Our Funding	Ensure the annual budget is aligned to the level of reserves and targets achieved	<ul style="list-style-type: none"> <li>Put in place plans and actions suited to all future needs</li> <li>Gain agreements from Board and Exec for annual plan</li> <li>Crystallise arrangements for funding with DoC</li> </ul>	<ul style="list-style-type: none"> <li>KPI (RAG report) monitored monthly by Exec</li> <li>Communicate as and when required</li> </ul>	NS	Mar-2026	Well Led Effective		
6.2	Our Funding	Ensure the annual budget is aligned to the level of reserves and targets achieved	<ul style="list-style-type: none"> <li>Put in place plans and actions suited to all future needs</li> <li>Gain agreements from Board and Exec for annual plan</li> <li>Crystallise arrangements for funding with DoC</li> </ul>	<ul style="list-style-type: none"> <li>KPI (RAG report) monitored monthly by Exec</li> <li>Communicate as and when required</li> </ul>	NS	Mar-2026	Well Led Effective		

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Ref. No	Strategic Pillar(s)	Area of Development	What will we do?	How will we know? / KPI	Lead	Target Date	KLOE	RAG	Notes
6.3	Our Funding	Budgets	Empower Managers to monitor and control their own budgets	Managers take charge of own areas	NV	Mar 2026	Responsive Well Led Effective		Provide Managers with monthly reporting to make informed decisions
6.4	Our Funding	Legacies	Improve information flow between Supporter Care Team and Finance	Hold meetings for better communication between departments	NV	Mar 2026	Responsive Well Led Effective		Ongoing  To improve legacies administration
6.5	Our Funding	Financial Procedures and processes	To review and update procedure manuals	Updated Procedure Manual	NV	Mar 2026	Responsive Well Led Effective		Ongoing process  Cash Handling & Anti-money laundering published in March 2026
6.6	Our Funding	Bank documentation	Review documentation regularly	Update of mandates and bank accounts documentation	NV	Mar 2026	Responsive Well Led Effective		Ongoing process

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### 7. Information Technology

Ref. No	Strategic Pillar(s)	Area of Development	What will we do?	How will we know? / KPI	Lead	Target Date	KLOE	RAG	Notes
7.1*	Our Care Our Community	Website	Development of a new replacement website	<ul style="list-style-type: none"> <li>New website</li> </ul>	JG/AC/RC	Mar 2026	Effective Responsive Well led		Completed.
7.2	Our Care Our Community	Telephone System	Replacement of the current VoIP phone system	<ul style="list-style-type: none"> <li>New system</li> </ul>	JG	Mar 2026	Effective Responsive Well led		Completed.
7.3	Our Funding Our People Our Community	Information Management	Ensure compliance with Payment Card Industry (PCI) Data Security Standards (DSS)	<ul style="list-style-type: none"> <li>Compliance report</li> </ul>	S-JH (procedural aspects) /JG (IT aspects)	Mar 2026	Effective Responsive Well-led		Completed.

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### 8. Fundraising

	Strategic Pillar	Area of Development	What will we do?	How will we know?	Who?	By when?	KLOE	R A G	Notes
8.1	Our Funding	Supporter Care	<ul style="list-style-type: none"> <li>• Income processing: process all income within 3 working days of being banked/received</li> <li>New instructions (Regular Giving/Lottery) processed within 5 working days</li> <li>Balance NXT to the bank exactly within 3 working days of month end.</li> <li>Gift Aid - GAD Record all GAD's received Take oral GAD's for high value donors % compliance to be shared monthly</li> <li>Quarterly GA claims and audit</li> <li>Supporter Journey Phone calls answer 95% within 3 rings</li> <li>Recording donor information on NXT</li> <li>Donor amendments within 5 working days</li> <li>Thanking all gifts responsible by Supporter Care within 5 working days</li> <li>Update fundraisers of any high value gifts or donors who require a specific journey</li> <li>Cross skilling of the Supporter Care team to give a better service and ensuring continuity</li> </ul>	<ul style="list-style-type: none"> <li>• % compliance to be shared monthly</li> <li>• Values of GA claims</li> <li>• Measuring any complaints received</li> <li>• Checking the Data Health on NXT</li> <li>• Thanking will be reported monthly</li> <li>• Training Matrix will identify our progress monitored by Head of SC &amp; Data &amp; Insight Manager</li> </ul>	GC/L R	March 2026	Well led/ef fective		All tasks have been achieved although our tasks are ongoing and will be continually monitored.

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	Strategic Pillar	Area of Development	What will we do?	How will we know?	Lead(s)	Target Date	KLOE	RAG	Notes
8.2	Our Funding	Legacy & In Mem Fundraising	<ul style="list-style-type: none"> <li>• Develop the Bereavement Pathway to support in mem donations.</li> <li>• Continue to implement in mem strategy including the reflective space, Tree of Life and other key activities throughout the year including Mother's Day, Father Day's.</li> <li>• Legacy marketing to continue with a bespoke campaign in November to increase pledges</li> <li>• Participate in Hospice UK legacy campaign and carry out aligned social media campaign.</li> </ul>	<p><b>Legacy KPIs:</b></p> <ul style="list-style-type: none"> <li>• Engagement and response rates to legacy marketing activity.</li> <li>• Generation of new prospects and pledgers and consequent cost per prospect/pledger</li> <li>• Increased insight and understanding of our supporters/prospects through quantitative and qualitative research project to inform recommendations on future legacy marketing activities.</li> <li>• Generation of new prospects and pledger disclosure through the September Hospice UK legacy campaign</li> </ul> <p><b>In Memory KPIs:</b></p> <p>Volume and value of in memory donations.</p> <p>Engagement through new in memory offers and products, including Book of Remembrance, Tree of Life and Much Loved tribute pages.</p> <ul style="list-style-type: none"> <li>• With the rollout of the Bereavement Pathway in September 2025 (a series of gentle touchpoints to the next of kin – that offer practical guidance, emotional support and meaningful ways to remember) we anticipate increased engagement across these products, and will be measuring and comparing income and engagement from the previous year.</li> </ul>	GC/AL	March 2026	Well led/ effective		

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	Strategic Pillar	Area of Development	What will we do?	How will we know?	Lead(s)	Target Date	KLOE	RAG	Notes
8.3	Our Funding	Individual Giving	<ul style="list-style-type: none"> <li>• Four appeals per year including two Raphaelites. ·</li> <li>• Communications to steward and cultivate lottery players</li> </ul>	<p><b>Individual Giving KPIs</b></p> <ul style="list-style-type: none"> <li>• 1. Gross and net income achieved vs target</li> <li>• 2. Expenditure vs budget</li> <li>• 3. Average gift per appeal, benchmarked against year-on-year performance for repeat appeals</li> <li>• 4. Response rate to appeals</li> <li>• 5. Year-on-year donor retention rate</li> <li>• 6. Number of new donors acquired – tbc – only if we do a cold appeal</li> </ul> <p><b>Regular Giving KPIs</b></p> <ul style="list-style-type: none"> <li>• 1. Gross and net income achieved vs target</li> <li>• 2. Expenditure vs budget</li> <li>• 3. Donor retention rate - % of donors still giving after 12 months</li> <li>• 4. Average monthly gift value per appeal</li> <li>• 5. Growth in regular giving income, measuring the number of new regular donors and associated income generation</li> </ul>	GC/FA	March 2026	Well led/Effective		

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	Strategic Pillar	Area of Development	What will we do?	How will we know?	Lead(s)	Target Date	KLOE	RAG	Notes
8.4	Our Funding	Philanthropy & Partnerships	<p><b>Trusts &amp; Foundations-</b> Increase applications and approaches to trusts and foundations, both restricted and unrestricted.</p> <p>Maximise funding opportunities from our current portfolio of Trusts and Foundations with an emphasis on unrestricted funding</p> <p>Deliver excellent stewardship for Trust and Foundations</p> <p><b>Corporate</b></p> <p>Development of a ‘top ten’ companies to approach</p> <p>Re-establishment of networking programme</p> <p>Sponsorship approaches for events.</p> <p>Attend regular networking events and discovery meetings with corporate prospects to cultivate their interest</p>	<p><b>Trusts</b></p> <p>Increase in no. of Trusts funders through prospect research and applying for new funding opportunities</p> <p>Applications – 30 Reports – 10</p> <p>Providing high quality reports and regular points of contact throughout the year</p> <p><b>Corporate</b></p> <p>Approaches – 50 Discovery meetings - 12 Proposals – 10 Reports – 10</p>	GC/DM	March 2026	Well led/effective		<p>Stats available upon request for some of the KPIs</p> <p>Strategies no longer being pursued</p>

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	Strategic Pillar	Area of Development	What will we do?	How will we know?	Lead(s)	Target Date	KLOE	RAG	Notes
			<p>Match corporate prospects with event sponsorship opportunities</p> <p><b>Deliver a corporate engagement event with an attached fundraising target</b></p> <p><b>Major Donor</b>- continuation of current donor cultivation through events, proposals and reports.</p> <p>Build stronger relationships with our current and new major donors through high quality stewardship</p> <p><b>Explore peer links from our current major donors and conduct prospect research to identify new major donor prospects</b></p> <p>GrowLight Up a Life major donor event with a view to adding an additional stewardship event for corporates the major donors</p>	<p><b>Major Donors</b></p> <p>Approaches – 10 Proposals – 5 Reports – 25</p> <p>Event Attendees - 20</p>					<p>Strategy no longer pursued</p> <p>Could do more here</p>
8.5	Our Funding	Community Event	<p><b>Challenge</b></p> <ul style="list-style-type: none"> <li>Grow the number of participants and number who reached required targets for third party challenge</li> </ul> <p><b>Community</b></p> <ul style="list-style-type: none"> <li>Grow the number of Educational establishments raising money for Hospice</li> <li>Grow the number of supporter group members</li> <li>Grow the number of Faith Groups engaging with the Hospice Events</li> </ul>	<p><b>Challenge</b> Number of participants</p> <p><b>Community</b> Number of Educational establishments</p> <p>Increased Numbers – Supporter group members &amp; Faith Groups</p>	SB/GC				We have increased London Marathon places significantly, not sure about total participant numbers across all challenge activities ncome has grown

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									considerably through our expansion of Community fundraising activities Not sure how our supporter group numbers compare to previous years

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### 9. Communications

	Strategic Pillar	Area of Development	What will we do?	How will we know?	Lead(s)	Target Date	KLOE	RAG	Notes
9.1	Our People	Empowering our staff and volunteers	<p>Work collaboratively with a wide range of internal and external stakeholder audiences through our communications channels to create high quality and varied communications to raise awareness and understanding of the work of the Hospice in Merton and Sutton.</p> <p style="color: orange;">Work with IT on new intranet by the end of the financial year.</p>	<p>Comms Team together to generate 12 patient / staff / volunteer case studies over 12 months.</p> <p>24 comms touchpoints for the Retail Department (shops, lottery, vols, clearance, wedding fair etc.) by the end of the financial year.</p>	GC/NT	March 2026	Well led Effective		Completed New Intranet pending to Mar 2027
9.2	Our Funding	Support the fundraising team	<p>Drive increased donations through compelling content</p> <p>Support fundraising marketing appeals (including Sponsor a Nurse) through multi-channel promotion to engage existing supporters and increase new donors.</p> <p>Help support and grow events – both fundraising and in mem – to maximise marketing through online digital and traditional print opportunities.</p> <p>Increase donor acquisition by supporting and encouraging donations through our</p>	<p style="color: orange;">Use online tracking tools (GA4) to clearly track donations and conversions from online comms to inform and improve messaging to our existing and potential supporters.</p> <p>Produce two new videos from Comms to vary comms content and test success of increased video usage.</p>	GC/NT	March 2026	Well led/Effective		Complete; Google Tag Manager through new website to track donations and conversions in 2026/27 plan

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			<p>communications to grow our database in line with GDPR and consent best practise.</p> <p>Exploit all marketing opportunities, both existing and new, to drive income including social media campaigns, increased use of video and collaboration opportunities with suitable organisations / individuals</p>						
9.3	Our Care	To communicate the positive impact of our care using the powerful voices and stories of patients and those close to them, our staff and volunteers to illustrate why our care is so vital	<p>Create compelling engaging content for all comms channels and marketing, giving a voice to the people we support through storytelling, strong imagery and video content where possible.</p> <p>Carry out a full audit of our current website and lead on a new website to ensure it is as impactful as possible, updated and fit for the future.</p> <p style="color: orange;">Complete comprehensive review of all existing Hospice collateral and streamline design and production processes to ensure minimum spend and maximum impact.</p>	<ul style="list-style-type: none"> <li>Regularly review and audit Hospice materials and content in the next 12 months</li> <li>Audit current website and work towards a new website to be launched in the next financial year</li> </ul>	GC/NT	March 2026	Well led/effective		Complete: Collateral review in 26/27 with new designer and new website
9.4	Our Community	Community Engagement	Create one strong brand narrative for the Hospice	Refreshed brand guidelines launched to the Hospice	GC/NT	March 2026	Well led Effective		

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	Strategic Pillar	Area of Development	What will we do?	How will we know?	Lead(s)	Target Date	KLOE	RAG	Notes
		Build the Hospice's profile in the local community as a specialist and expert provider of palliative care, searching out opportunities to engage openly in important conversations around death, dying and bereavement.	<p>Increase brand awareness throughout our Hospice patch through an integrated brand campaign, trialling new ways to raise awareness and funds for the Hospice.</p> <p>Unify and engage colleagues across all departments by continuing to develop professional, clear and streamlined internal communications for staff through regular news, updates and announcements.</p> <p>Update brand guidelines and house style guidelines to hone St Raphael's consistency in our look, feel and tone.</p> <p>Implement a new social media strategy</p> <p>Increase impact and reach of social media channels using organic and paid content, honing different content for different audiences, based on clear metrics</p>	Increase social audience by 15%					

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### 10. Commercial

	Strategic Pillar	Area of Development	What will we do?	How will we know?	Lead(s)	Target Date	KLOE	RAG	Notes
10.1	Our Funding	Meet & exceed sales and budget for 24/25 across all shops	<p>Maintain presentation and standards, ensure shops are inviting, welcoming and inspirational. Refreshing stock as per guidance. Uphold quality for the style of shop maintaining densities as appropriate. Price to maximise return on every donated item according to shop type.</p> <p>Increase social media presence and engage with the public and influencers.</p> <p>Look at innovative ways to maximise income from events and eBay keeping within staffing budget.</p>	<ul style="list-style-type: none"> <li>Weekly sales figures against budget.</li> <li>Presentation of shops stock, quality, quantity and pricing.</li> </ul>	SJH/ CW	March 26	Well-led & Effective		<p>Continue sharing sales figures with staff and volunteers. Regularly review performance through Lead Managers</p> <p>Income under budget by a few thousand – offset by less than budgeted expenditure</p>

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	Strategic Pillar	Area of Development	What will we do?	How will we know?	Lead(s)	Target Date	KLOE	RAG	Notes
10.2	Our Funding	Meet & Exceed budgeted profit	Control staff costs. Constantly review contracts and consumables. Increase prices in line with inflation.	<ul style="list-style-type: none"> <li>Review P&amp;L</li> </ul>	SJH/CW	March 26	Well-led & Effective		Work with finance re P&L  Review regularly  Distribute staff resource according to sales, volunteer number, layout and individual circumstances.
10.3	Our People	Management of our team both paid and volunteer.	Train, develop and support both paid and unpaid staff.  Recruit sufficient volunteers to support income generation in very shop.  Motivate all staff connecting them to the work of the Hospice.	<ul style="list-style-type: none"> <li>Roll out and record all training.</li> <li>Target recruitment of 100 new volunteers.</li> <li>Visit shops with hospice update. Share information with staff and volunteers and encourage everyone to read the e-news.</li> </ul>	SJH/CW	March 26	Well-led & Effective		Individual KPI's for managers re volunteer numbers.  Work with volunteering to create recruitment campaigns and social media content.

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	Strategic Pillar	Area of Development	What will we do?	How will we know?	Lead(s)	Target Date	KLOE	RAG	Notes
10.4	Our Funding	Fundraising and Communications	Work with Fundraising & Communications to maximise the brand and promote fundraising initiatives.	<p>Retail Materials to be on brand and up to date.</p> <p>Have quarterly meetings with Head of Comms.</p> <p>CD and Dof F&amp;C meet monthly.</p> <p>Liaison with Fundraising teams to support events etc.</p>	SJH/ CW/GC/NT	March 27	Well-led & Effective		

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### 11. People Services

	Strategic Pillar(s)	Area of Development	What will we do?	How will we know?	Lead(s)	Target Date	KLOE	RAG	Update/Comments
11.1	Our People	<u>Systems:</u> Recruitment	Implement Applicant Tracking System (ATS).	Automate recruitment and onboarding processing, ensuring attraction of best candidates and consistent processes and practices. Create and establish reporting requirements.	NP	Sept 2025	Well-led Effective		Implementation and review complete
11.2	Our People	<u>Systems:</u> HR	Research and procure new system.	Create spec, source providers and produce business case for approval. To enable notice to be served on current system.	NP	Feb 2026	Well-led Effective		Complete
11.3	Our People	<u>Systems:</u> Payroll	Embed new system, creating processes.	Multiple sign off/checks to ensure correct submissions and processes to provide cover for absence within the team.	NP	Aug 2025	Well-led Effective		Complete
11.4	Our People	Diversity, Equality, Equity & Inclusion	Guide and support line managers to help their people feel valued, accepted and listened to.  Break down barriers to form an inclusive climate and culture, always being	Consistently supporting all people through regular contact including meetings, supervisions and appraisals.  Engage and consult with all people via meetings and surveys.	NP	Ongoing	Well-led Effective Caring		Ongoing - Birdsong surveys completed Dec 25

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	Strategic Pillar(s)	Area of Development	What will we do?	How will we know?	Lead(s)	Target Date	KLOE	RAG	Update/Comments
			sensitive to the differences of others.	Understand the makeup of the workforce. Create and revisit metrics.  Supply flexible spaces for our people to thrive at work.					

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### 12. Volunteer Services

	Strategic Pillar(s)	Area of Development	What will we do?	How will we know?	Lead(s)	Target Date	KLOE	RAG	Notes
12.1	Our People	System improvement	Implement Raisers Edge Volunteer Module  Meet with Richard Carman (Database Manager)  Transfer data from Natural HR to new database  Receive training & create written processes  User Acceptance Testing  Evaluation	Provide reporting for HR Committee.  Provide live data to HoDs to ensure increased effective access and placement of volunteers.  HoD's are able to view current volunteer pool and can understand their skill sets.	GT/LH/ NP	Dec 2026	Effective Well-led		Part completed – training, UAT and evaluation to do

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	Strategic Pillar(s)	Area of Development	What will we do?	How will we know?	Lead(s)	Target Date	KLOE	RAG	Notes
12.2	Our People	Attain Re-accreditation of Investing in Volunteers Award	Complete liV journey by following our Development Plan, organise & facilitate requirements for the assessment days in November; reach standard required.	Re-accreditation of liV standard.	GT/LH	Dec 2025	Effective Well-led		Complete

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	Strategic Pillar(s)	Area of Development	What will we do?	How will we know?	Lead(s)	Target Date	KLOE	RAG	Notes
12.3	Our People	Volunteer Engagement	Survey	Evaluation of survey	GT/LH/ NP	Mar 2026	Effective Caring Well-led		Ongoing – survey completed in Dec 25
			Feedback form	Form for volunteer to complete within 6 months of commencing volunteer journey; understand & implement improvements; ascertain new opportunities for volunteers, and/or roles.					To do
			Arrange events (2 min per annum)	Increase engagement & celebrate diversity within volunteer cohort.					Thank you event held in Nov 25
			Recognise birthdays & acknowledge life events	Feedback from volunteers.					Ongoing