



AIR AMBULANCE CHARITY  
KENT SURREY SUSSEX

## Getting the most from a foundation audit

wood  
for trees

A Wood for Trees case study

# Key benefits

- 'Big picture view' of all data to diversify income streams with confidence
- Actionable insights to help in decision making and planning for future fundraising programmes
- Identification of opportunities and threats to income generation, such as the potential for lottery upgrades and having few email consents
- Direction on where to adapt and be bolder in fundraising activities during Covid-19



# Overview

Air Ambulance Kent Surrey Sussex (KSS) is an independent charity that provides 24/7 Helicopter Emergency Medicine Services (HEMS) across Kent, Surrey and Sussex.

Gaming is the largest revenue stream for KSS at around £9m per year, with 100,000 people playing the KSS lottery. In-memory and legacy donations are expected to reach a total of £3m this year. Plus, other individual giving activities bring in approximately £1m annually, along with development fundraising earning the charity over £500,000.

Fundraising and events are a growth area for KSS at £1.3m a year, with cause-related appeals being a relatively new focus.

The charity wanted to grow and diversify their income streams, avoiding a reliance on their hugely successful lottery revenue, but experienced limitations with their existing CRM database to make informed decisions.

To unlock a 'big picture view' of their fundraising campaigns and supporters, KSS sought the help of Wood for Trees to conduct a foundation audit and provide actionable insight.

Opportunities and threats to the charity's income generation were identified in the foundation audit, such as the potential for lottery upgrades and having few email consents, which could then be actioned.



# Challenge

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A strategic decision to grow and diversify income streams resulted in the creation of the individual giving team led by Symon Russell, who joined the charity as Director of Individual Giving in 2019. Since then, the charity has moved towards more proactive fundraising and explored new income streams.

Owning one of the first charity lotteries to go to market, the KSS lottery works incredibly well and has a large supporter base. But to avoid relying on this revenue stream so heavily, KSS wanted to branch out to other fundraising channels.

They'd been using a CRM system to manage their supporter relationships and lottery fundraising. It could hold fundamental data, but it was difficult to access the full potential of the data. It wasn't showing the 'big picture view' the team needed to be able to diversify with confidence, nor did it allow them to easily see all individuals stored across the database.







# Solution

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As a first step, KSS decided to commission a Wood for Trees foundation audit to enable the team to make better use of their data, clarify their assumptions and uncover new opportunities.

The foundation audit was completed in three phases in February 2020, prior to the onset of Covid-19.

## Phase one – collate and share data

This initial phase of the foundation audit is where the charity had the most involvement. Before the audit and analysis could begin, our analysts needed to understand what data they were dealing with, such as, how to identify supporters and transactions in the existing CRM database.

Some in-house knowledge was needed to help initially decode the data. Explorative interviews between our analysts and the team at KSS helped in understanding the existing data, whilst also providing opinions and views from across the organisation.

## Phase two – audit and analysis

Our expert analysts dug into the data, found interesting insights and presented it back to the team at KSS. And what was uncovered was fascinating once time had been dedicated to pick apart the information and find bits most relevant to different people and roles within the organisation.

## Phase three – action the insights

Once insights were discovered and time was taken to ask questions about, discuss and fully understand the data, it was time to start putting plans into action.



# Results

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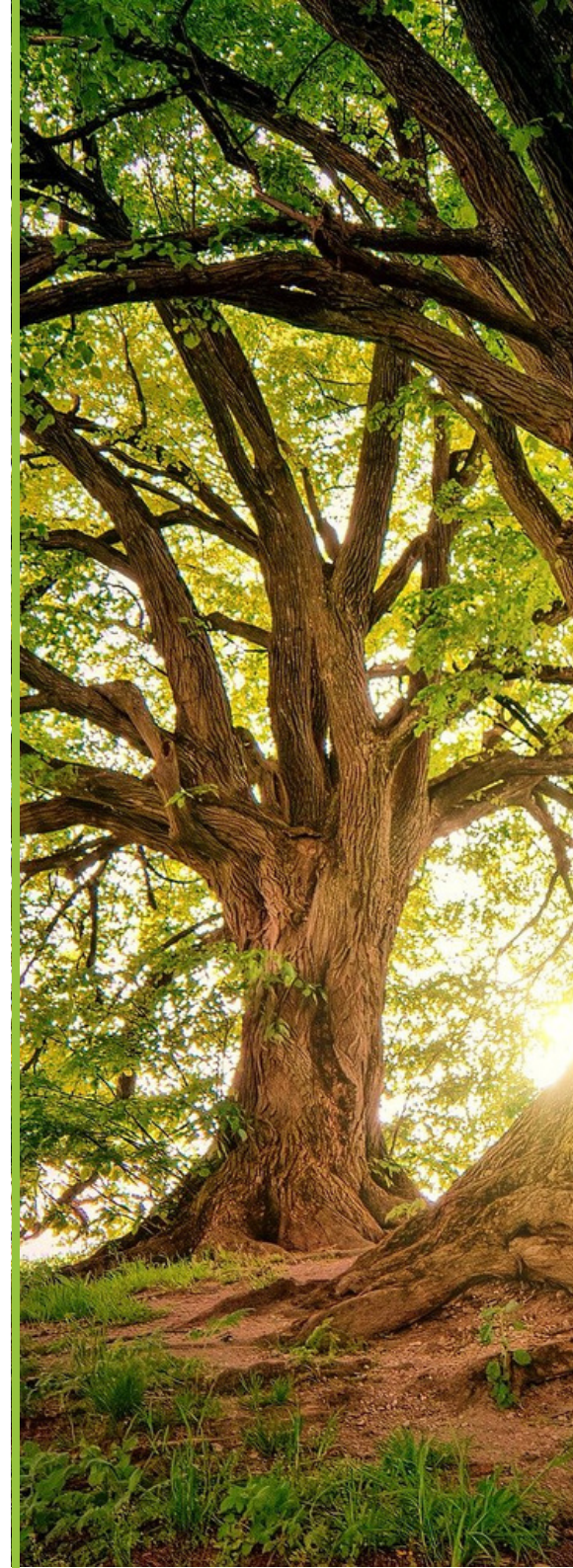
The foundation audit highlighted some opportunities in, and threats to, KSS income generation.

Keeping in regular contact with KSS supporters is key to raising the charity's income. Plus, digital communications are becoming increasingly popular. But, from the analysis, it was evident how few email consents they had, which identified an issue they needed to address.

The analysis confirmed that the vast majority of KSS supporters were recruited onto one product and weren't being effectively cross sold onto others. The charity had never asked KSS lottery players if they'd like to take up an extra line before. Since the audit, this upsell activity has taken place and due to its success in the last year, a second upgrade campaign is now running.

During the pandemic, KSS launched their first emergency appeal and significantly changed some of their fundraising activities. Usually, they'd rely on face-to-face canvassing. But the foundation audit provided some direction on how to adapt and highlighted areas where they could be bolder during a period of monumental change.

Overall, the foundation audit has laid the groundwork for transforming supporter data held by KSS. It's facilitated the analysis of existing fundraising programmes and suggested ways to change activity.





# Get in touch

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