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# What constitutes a successful patient organisation?

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# Current financial climate



- The current financial climate has put pressure on the majority of charitable organisations and challenged ‘business as usual’
- Those relying totally on voluntary donations have been particularly hard hit with reductions seen across all income streams
- This time does however provide the impetus to evaluate strengths and weaknesses and identify any niche areas where you can add value. Reduced financial capacity doesn’t equate to inability to be successful

## Key factors that influence success



- A strong mission and/or vision statement that patients can identify with and stakeholders want to be associated with

**‘Control over asthma today, freedom from asthma tomorrow’ - Asthma UK’s mission statement**

- A strategic plan covering 3-5 years
  - goals and objectives need to be action focussed
  - determine the resources needed to deliver the strategy

# Key factors that influence success



- Communication/marketing strategy
  - ensure your vision covers the needs of all your stakeholders, need to determine their needs eg through advisory forums
  - segment your audience, people want to engage in different ways and have different needs
  - target your audience, have a range of products
  - position yourself with key groups of stakeholders
- Ability to demonstrate the impact of your work
  - evaluate projects
  - develop key performance indicators and monitor progress against these
  - disseminate information about achievements and impact of your work

# Key factors that influence success



- Credibility with external stakeholders
  - audited accounts
  - publish an annual review of achievements
  - being viewed externally as experts, especially in the patient perspective and ability to influence
  - engage with stakeholders to ensure you are meeting their needs
- Demonstrating high levels of professionalism
  - managing transparent and peer-reviewed research programmes
  - abide by codes of conduct when working with pharmaceutical industry and other corporates
  - strong policies around management of conflict of interest
  - policies around volunteering so people know what to expect and what is expected from them
  - timely responses to external stakeholders

# Key factors that influence success



- Being innovative and entrepreneurial
  - changes in the marketplace often represent opportunities
  - identify where your niche is
  - actively look for opportunities externally
- Having a strong volunteer base
  - whatever the size of your organisation, volunteers offer significant opportunities to expand your programme of work and act as advocates
  - a volunteer strategy is helpful in setting out how people can be involved, what is expected of them ie accountability and the training that will be required for them to be effective

# Key factors that influence success



- Working in partnership
  - Partnership working includes work with patients, healthcare professionals, other charities, government, corporate organisations etc
  - Prevents unnecessary duplication eg educational materials for schools on long-term conditions
  - Potential to share costs and resources
  - Potential to raise income from alternative sources eg EU funding
  - Strengthens lobbying and influencing work
- Information provision
  - High quality, evidence based information is essential so that patients and healthcare professionals will use your organisation as the reliable source of information
  - Regularly review all health promotion materials

# Key factors that influence success



- Successful income generation
  - understand what motivates people and organisations to give
  - develop long-term relationships so that asks can be increased over time
  - create perception amongst donors of ownership of outcomes eg naming opportunities, getting them engaged
  - appeal to both the rational and emotional elements of giving
  
- Diversity of income generation
  - individual giving
  - trusts
  - statutory funding
  - corporate funding

# Summary



- Long-term success in a tough financial environment means that you will need to diversify income streams, including working with corporates
- A strong mission statement and high quality information provision will drive stakeholders to you
- Monitor the impact of your work and communicate this to stakeholders
- Use volunteers effectively to broaden the scope of your work
- Partnership working can increase your ability to influence and can offer additional funding opportunities
- Be innovative and identify new opportunities
- Ensure a credible and professional service at all times



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