

# The National Archives

fundraising  
for  
archives



## Friends Groups and Volunteers



Llywodraeth Cymru  
Welsh Government

# The National Archives

**Friends and Volunteers**

**Fundraising for Archives**



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# Aim of Today

You will have increased confidence to engage Friends groups and volunteers in undertaking and supporting fundraising activity for your service

# Agenda

- Why are Friends and volunteers useful for Fundraising?
- Developing a shared fundraising goal
  - BREAK
- Fundraising activities with Friends and volunteers
  - LUNCH
- Friends as fundraising ambassadors
- Fundraising events
- Harnessing volunteer support
  - BREAK
- Other types of Friends



# FUNDRAISING WITH FRIENDS AND VOLUNTEERS

Skills and  
experience

Matched  
funding

Networks

Time

**WHY ARE FRIENDS  
& VOLUNTEERS  
USEFUL FOR  
FUNDRAISING?**

Membership  
fees

Advocacy

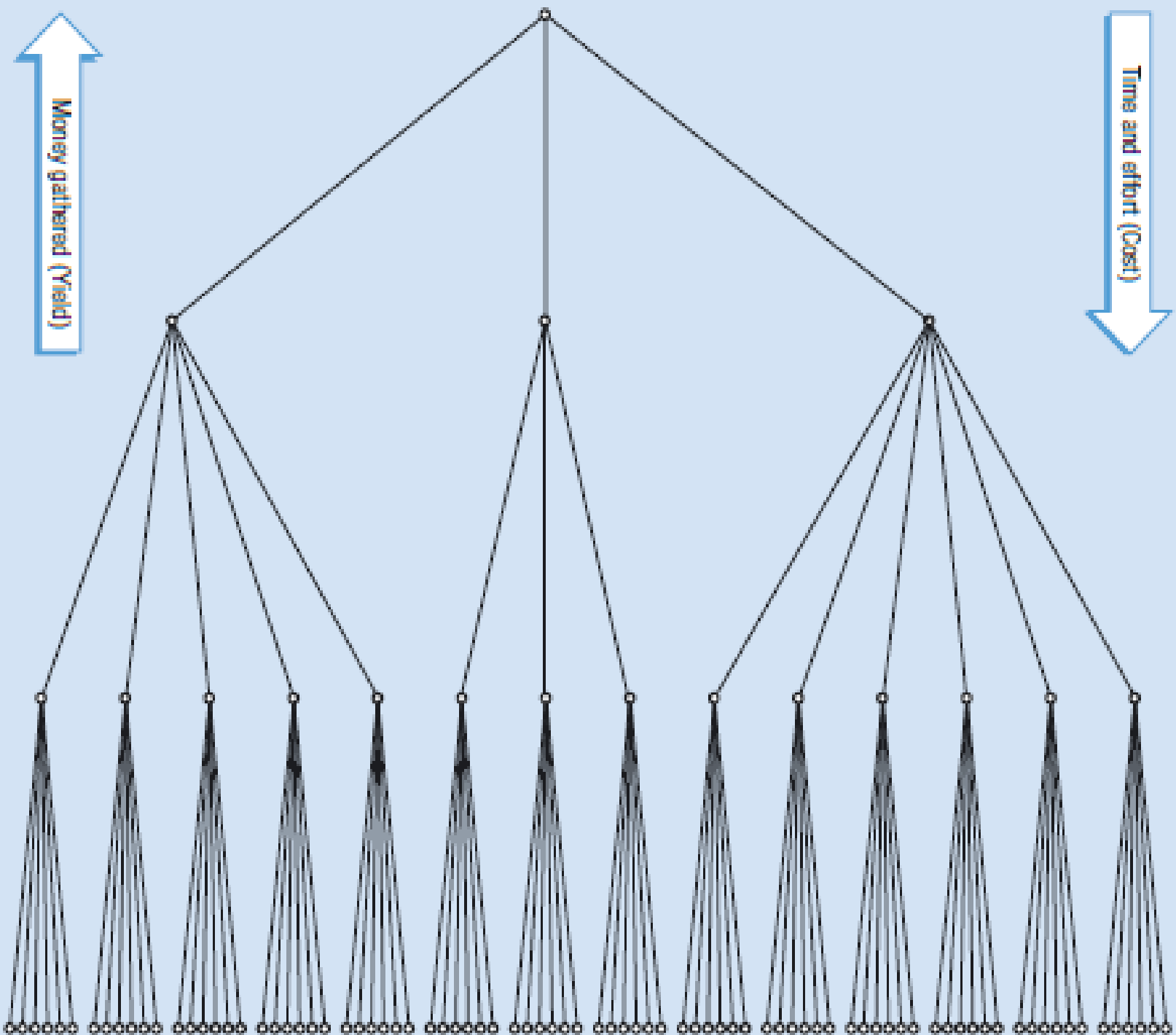
Passion

Community  
Presence

Charitable status

Times and effort (Cost)

Money gathered (Yield)



# Contribution multipliers



# Friends group models

- Friends groups are generally set up in one of two ways:
  - Independent charity in their own right – self-servicing
  - Membership model – managed in-house
- They adopt one of two models:
  - Social club
  - Membership scheme with direct benefits (akin to museum Friends)
- Structure and model will influence how to lead fundraising activity with Friends:
  - **Direct** leadership and call to action
  - **Influencing** to join a ‘shared goal’ and support action
  - Extent of benefits ‘in return’ for support

# How it can go wrong... 1,700 supporters lost!



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TRENDING POPPIES IN LIVERPOOL 2015 JURGEN KLOPP CHRISTMAS IN LIVERPOOL HILLSBOROUGH Sport Crime Business Arts & Culture Wirral

» News » Liverpool News

## Liverpool museum friends group breaks up over row with boss Dr David Fleming

00:00, 23 JAN 2009

OPINION

BY JOERILEY



A GROUP which has given hundreds of thousands of pounds to the arts in Merseyside has broken up amid a row with the region's museums boss.

Recommended in Liverpool News



LIVERPOOL FC Was Klopp reaction to Liverpool FC draw



# Case study: Friends of Lancashire Archive

- Independent registered charity.
- One of the largest archival support groups in the country, set up in 1986 to support and promote work of local authority managed Lancashire Archives.
- Since establishment, they have raised over £75,000:
  - ❖ Appeals to support collections purchase
  - ❖ Acquisitions purchases – objects, letters
  - ❖ Equipment purchases
  - ❖ Apprenticeship / student work funding
  - ❖ Events to promote the archives



# Six Thinking Hats®

Blue Hat - Process

White Hat - Facts

Red Hat - Feelings







Green Hat - Creativity

Yellow Hat - Benefits

Black Hat - Cautions



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COLOURED HAT	THINK OF	DETAILED DESCRIPTION
	<b><i>White paper</i></b>	The white hat is about data and information. It is used to record information that is currently available and to identify further information that may be needed.
	<b><i>Fire and warmth</i></b>	The red hat is associated with feelings, intuition, and emotion. The red hat allows people to put forward feelings without justification or prejudice.
	<b><i>Sunshine</i></b>	The yellow hat is for a positive view of things. It looks for benefits in a situation. This hat encourages a positive view even in people who are always critical.
	<b><i>A stern judge</i></b>	The black hat relates to caution. It is used for critical judgement. Sometimes it is easy to overuse the black hat.
	<b><i>Vegetation and rich growth</i></b>	The green hat is for creative thinking and generating new ideas. This is your creative thinking cap.
	<b><i>The sky and overview</i></b>	The blue hat is about process control. It is used for thinking about thinking. The blue hat asks for summaries, conclusions and decisions.

The White Hat statement represents facts without interpretation.

Our sales have increased each of the last three years to college students in Texas and have decreased to professors in Ohio.

Our customer survey last month indicated a 2% preference for the green product by men ages 25-35.

We reached 10% of retailers; 12% took our product; 40% returned it.

What does the balance sheet indicate?

All this talk of revenue loss is making me sick.

I feel we are being bullied into an agreement we do not want.

This new feature set is designed to delight our customers.

There is a feeling this new organization will not make a difference. Let's imagine our decisions today can impact our new direction.

The Red Hat represents the emotional response. The emotion can apply to either the speaker or the subject of the statement. The Red Hat makes feelings visible and legitimizes emotion.

The Black Hat is the critical thinking and looks at "what's wrong with this picture?" It needs to be truthful and factual without judgement. Black hat is not concerned with problem solving--only with pointing out the problem.

Rising wages will force up production costs and put us out of business.

As far as I know, that is an assumption.

If we don't show the value to the user, they won't pay a premium.

The numbers from the questionnaire may be underestimated because not everyone interpreted the question the same way.

Bundling the product provides a cost incentive to customers and could improve revenues.

Lowering prices could make the product more accessible to a wider audience.

The organization provides more direct access to senior managers.

Design reviews could help us find bugs earlier in the process and save development and testing costs.

The Yellow Hat, opposite of the Black Hat, puts forth the benefits of an idea. In the case of new ideas, it should always be used before Black Hat.

The Green Hat is for creative thinking represents new ideas. This is the place to encourage "out of the box" thinking.

Each artist could offer a photo of the work in progress as an incentive to buy the piece during the show opening.

We could try including design reviews and code reviews into our development process.

We could provide the user with multiple entry points to improve discoverability.

We could introduce color as an option.

We'll start with White and Blue hats, then move to Green, Yellow, Red, and Black in that order.

Let's go around the room once and get at least one new idea from everyone.

Let's hold off on Black Hat thinking for now.

So we've decided to continue with the Mackey project but drop the Stower effort until we have further data.

The Blue Hat manages the process of the discussion and thinking. It sets the rules at the beginning and provides the summaries and conclusions at the end.

Create your own at [StoryboardThat.com](http://StoryboardThat.com)



Fundraising with Friends and Volunteers

# A SHARED FUNDRAISING GOAL



# Why do we need a shared goal?



# How do we create a shared goal?

- Set-up and management – the value of in-house management
- Ideally – **strong input into Friends charity objectives** – purpose of the organisation ‘to support / raise funds for...’, seat on management committee – lots of planning / thinking / work at this stage can reap benefits later on!
- **Regular meetings** to focus objectives and activity
- One to one **relationship with Chair and key members**
- Direct appeals for help with **specific, tangible goals** that can be devolved to the group
- **Identify mutual interests to build engagement** – e.g. ancestry, local history, specific collections – e.g. author papers, local estate, themes
- **Include in fundraising strategy** – involve, don’t side-line
- **Include in celebrations** – drinks events, volunteer awards

# But what is goal in financial terms ££££?

- **What do they cost you?** – do a cost / benefit analysis – need to understand the time and money cost to the archive of servicing a Friends group and volunteers to ensure fundraising covers costs **AND** generates additional income.
- **How many?** – if you can raise £1 from each and you have 100...
- How active? Skills? knowledge? – what kind of activity might suit?
- **How much do you need** to raise (E.g.. cost of equipment, collection purchase) and **how much of this do they think they could raise?**
- Can you **develop a support mechanism** whereby £5 of each membership fee is donated directly to the archive? Or an annual group donation made each year? (use cost/benefit analysis to inform).
- **Friends = Lifetime value not one-off sum.**
- Pilot ideas and see what works – **use results to set targets** for subsequent activity = focus and a challenge!

# Leadership and management required

- Cost / benefit analysis – need to understand the time and money cost to the archive of servicing a Friends group and volunteers to ensure fundraising covers costs **AND** generates additional income.
- Shared aims need to be established – think SMART
- Differences need to be managed
- Ensure committee members represent the membership
- Communicate frequently
  
- Friends can be like long-standing staff members, personal friends, new acquaintances – think - how would you treat these?

# Structure & Governance



"There must also be a genuine commitment amongst all fundraising practitioners as well as charity chief executives and trustees to show greater respect to the public, and to ensure that every fundraising experience is a positive one."

- Andrew Hind, Chair of FRSB

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# FUNDRAISING ACTIVITIES



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# Friends of Lancashire Archives Appeal



August 2014

The Friends of  
Lancashire Archives

## Save the Hulton Archive

*Major fundraising campaign by FLA*

This major family and estate archive of the Hulton family of Hulton near Bolton was deposited for safekeeping in Lancashire Record Office on 24 July 1943 by Sir Roger Hulton, 3<sup>rd</sup> baronet and 29<sup>th</sup> lord of Hulton.

For the past 70 years it has been stored in the best conditions and has been freely available to the public for research and exhibition. Lancashire County Council has ensured that the collection is preserved for posterity. Archivists have catalogued the core collection, and created draft lists of more recent deposits, while conservation work has been carried out on many individual items.

Now the present owner of the archive wants to sell it. The Friends of Lancashire Archives are leading a campaign to help in raising the £95,000 purchase price *by the end of November*. We believe it is vital to keep the archive intact and in Lancashire. If we are unable to raise the money there is a real risk that it will be split up and that some material will go overseas.

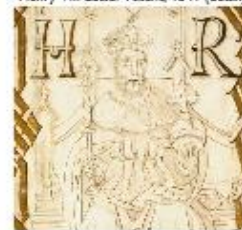
### Inside

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Cartmel Priory Mandata, 1418 (detail)

Henry VIII Letter Patent, 1541 (detail)



**FLA  
pledges  
£10,000**

*By Nigel Neil, FLA  
Chair*

The Hulton Archive is nationally and locally significant. At the last committee meeting, FLA made a substantial £10,000 commitment to the campaign.

We are confident that members will take pride in being part of the movement to save this key collection for public access, and to keep in Lancashire where it has been cared for meticulously for the past seventy years.

*I appeal to all  
members of FLA to  
spread news of the  
campaign further.*

# Friends of Lancashire Archives Volunteering



FRIENDS OF LANCASHIRE ARCHIVES

## NEWSLETTER

OCTOBER 2015

MICHAELMAS EDITION



## Locating Lancashire's archives around the UK: an ongoing project for FLA members

By Alan Crosby (Chairman, Friends of Lancashire Archives)

Recently the Archives Collections Manager, David Tilsley, urgently informed the FLA Committee about some important Lancashire documents which were about to be sold at auction. He asked whether the Friends would be able and willing to provide funding to purchase the documents – and after a very quick email consultation we agreed to do so, up to an agreed maximum price.

There were three separate lots, comprising four documents dating from the 13th—15th centuries. Medieval material from Lancashire is relatively rare, and these documents were in excellent condition. Unfortunately, such is the way of these things, we were outbid on two of the lots, but were successful in acquiring the deeds from Mitton and Claughton (illustrated on this page).

In principle, we really don't like this sort of procedure – ideally, of course, material such as this should be housed at Lancashire Archives

anyway, and it's not good to encourage the public sale of historic documents, since every higher bid increases the already inflated market price for material of this sort.

We can't (and won't) bid for material indiscriminately, but items such as these have a particular importance and in the circumstances we felt it was important to try.

During the bidding process two important future steps for the Friends came under discussion. First, we had already been discussing, with the Archive Service, developing a programme of buying top-quality digital copies of Lancashire-related archives (especially maps) which are held elsewhere or have been bought by others; and second, we felt .....continued on page 6



Deeds from Mitton and Claughton

### Inside

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The Friends of Lancashire Archives registered charity Number 518611



# Typical activities for Friends groups

- **Basic:**
  - ❖ Open days / weekends,
  - ❖ social events/talks with tickets sold to support archive,
  - ❖ Group sponsored events
  - ❖ Individual activities –e.g. half-marathon running
- **More experienced:**
  - ❖ Running an appeal – targeted amounts to purchase a specific item
  - ❖ Writing funding applications in their own right and for specific archive activity (e.g. HLF, small Trusts)
- But scope for more - limited only by imagination, creativity and capacity for enterprise...

# Get creative: fundraising ‘experiences’

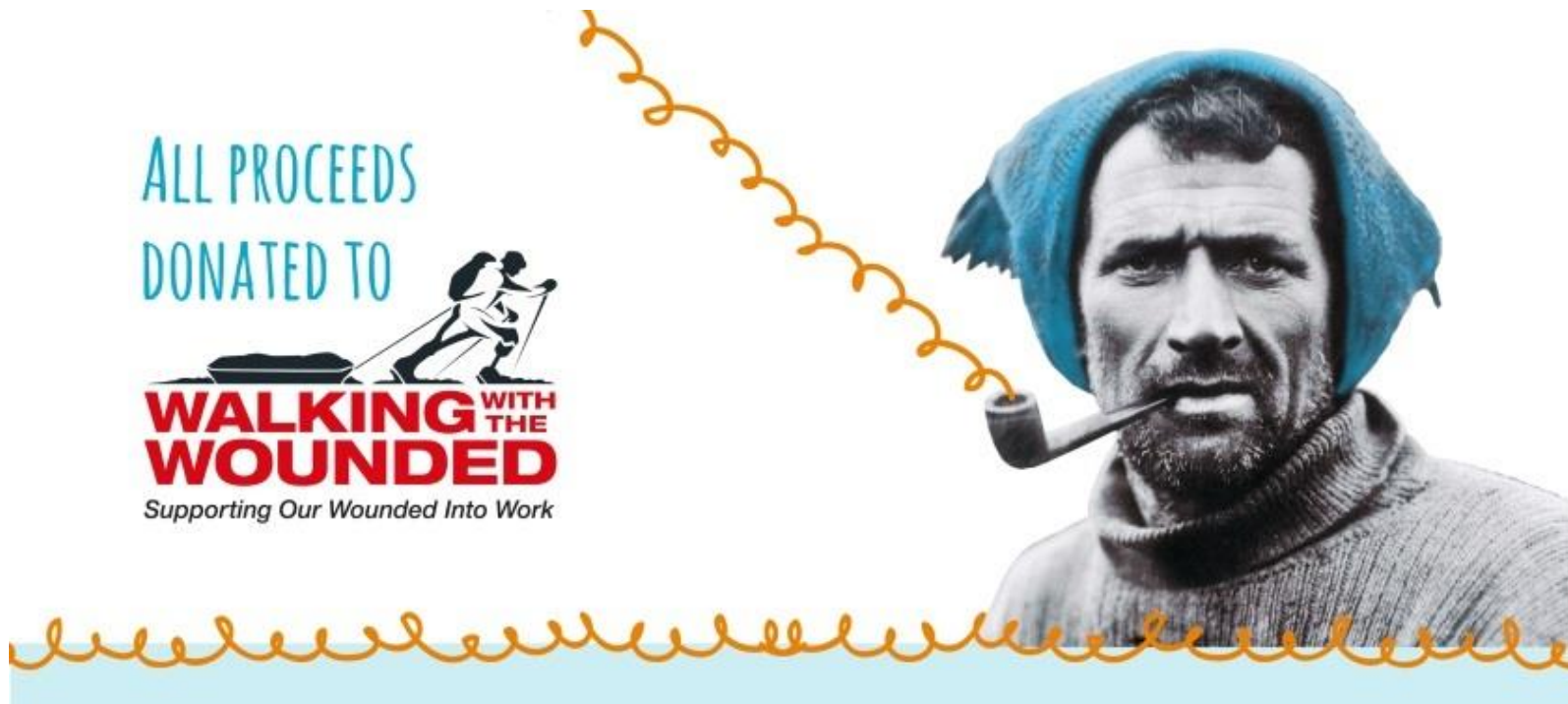
- Giving to charity and volunteering time to one is part of a **life-style choice** – it is therefore an ‘experience’.
- What ‘experiences’ can you and your Friends or volunteers think of that will excite the group to get involved and donors to give money?
- **What have you got in the archive that could spark ideas** – themes, key artefacts, treasures, funny items?!

# Case study: Durham Cathedral

- Creative, innovative and complex grassroots fundraising campaign
- Aim to raise £300,000 for Cathedral's Open Treasures campaign, including re-display of archives
- £1 donation for each Lego brick - by December 2015 had sold over 170,000
- Has included local companies and schools in its fundraising
- Limited edition spin-offs and product developments



# AND THIS?!



## DURHAM UNIVERSITY PALACE GREEN LIBRARY

# Case study: Durham University, Palace Green Library

- Exhibition - Antarctica: Explorers, Heroes, Scientists (17 Oct 2015 – 7 Feb 2016)
- Asked craft enthusiasts to make hats fit for heroes, inspired by Antarctic explorers.
- Over 400 hats donated and put on sale (Dec 2015), income matched by bank
- Good example of potential to mobilise power of friends groups
- Strong link between content of exhibition, local history (Tom Crean, right) and fundraising ask.



# Innovate! – convert other people’s ideas

- What are mainstream charities doing – can you **gain ideas**?
- What are major archives, museums doing – can you **replicate**?
- Two heads are better than one – brainstorm ideas – a potential activity to **involve** Friends and volunteers

# Your turn!

- What have you got in the archive?
- What are Friends / volunteers interested in?
- What might the public be interested in?
- What interesting examples have you seen elsewhere that could be built on?
  
- ***Use Handout #3.01 to map out some ideas...***
  
- *Working as a group, everyone to think of their most interesting / noteworthy item or collection...*



# LUNCH



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# FUNDRAISING AMBASSADORS



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# Networking to funds via Friends

- **Stakeholder mapping exercise** to identify links to potential donors / influencers / skilled individuals – either informally (chats over coffee) or formally – host a meeting with Friends to find out who they know.
- Potential links to key influencers – can they introduce you?
- Word of mouth advertising: other people saying how great you are is more convincing to others than saying it yourself

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# FUNDRAISING EVENTS



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# Anniversary and occasion events

- FLA 75<sup>th</sup> Anniversary of Lancashire Archives weekend activities to **raise profile** –
  - 1940s-themed archive open day = **new people**
  - Family history fair = **audience targeting**
  - A stall held on both days raised £300 = **income** for Friends or archive
- **Delivery of PR events beyond archive staff capacity,** plus fundraising which could include:
  - Raffles
  - Launch or targeted marketing and push for an appeal
  - Talks and / or social gatherings to bring in stakeholders

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# VOLUNTEER SUPPORT



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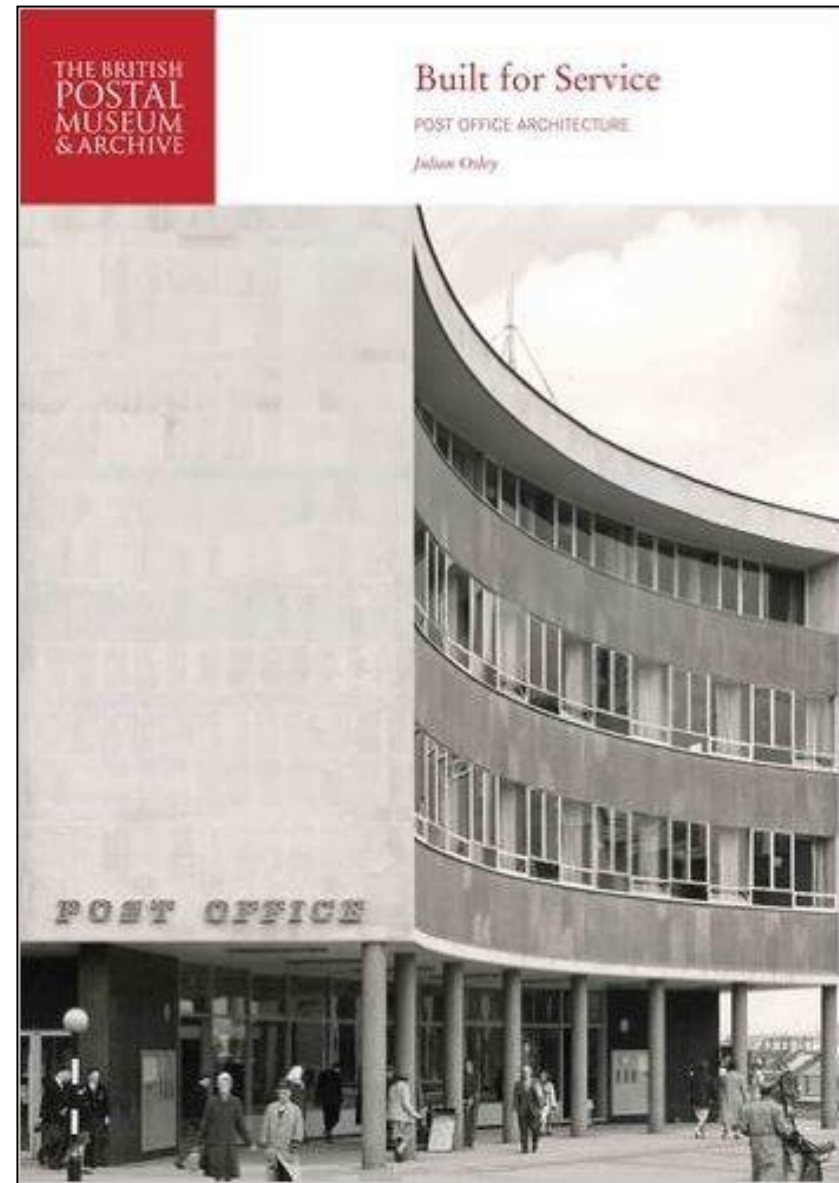


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# Supporting ongoing work

- **Indexing assistance**
- **Researching** specific areas – e.g. under utilised collections, background work to support fundraising appeal or activity.
- **Tours** – facilitating public access to archive
- **Time** to man stalls in public places to raise funds or raise profile.

# CASE STUDY: BRITISH POSTAL MUSEUM & ARCHIVE



# Case study: Opening up the archive + income...

- Research and writing of first ever publication on post office architecture (small fee) = **access to under researched area of archive**
- Content for book promoting archive material (archive editorial input) = **trading income, marketing of archive**
- Related talks, blog articles, volunteer set up own post office architecture web presence = **PR**
- Volunteer went on to assist cataloguing of photographic collection = **6 years+ regular volunteering commitment and counting...**
- **Match funding** support for HLF capital campaign

THE BRITISH  
POSTAL  
MUSEUM  
& ARCHIVE



# Match funding support opening up other funds

- Time volunteered by Friends and other individuals also counts as '**match funding**' for many funders – the number of hours volunteered can be calculated and an amount per hour associated. This can often support or be crucial to the success of a funding application.
- Many funders will not fund 100% and/or like to see ££ go further – adding match funding in form of volunteer hours can help meet this requirement.

# Scenario Exercise – Handout 3.02

- *Thinking about other people's problems can inform our own...*
- Take one scenario **and thinking everything discussed** today, sketch out the beginnings of a plan for:
  1. dealing with any issues
  2. gaining support for fundraising activity, focusing on ideas for raising funds.

Fundraising with Friends and Volunteers

# OTHER FRIENDS



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# Other Friends mechanisms

- **Organisation / corporate Friends schemes**
  - Partnership activity – shared workload, often favoured by funders,
  - Audience development – new people who may in turn become your ‘Friends’, increased user engagement
  - Potential small income stream – group membership level
  
- **Patrons**
  - Tailored involvement for key individuals – potential major donor, key influencer (e.g. MP, local celebrity)
  - Potential lead ambassador and networker for your cause.

# CASE STUDY: MILLS ARCHIVE



# Case study: Mills Archive

- In-house managed Friends scheme.
- Successful 2014 HLF Catalyst scheme bid enabled, the Trust to extend Friends offer to organisations:
  - ❖ Heritage Partnership – small mills and heritage-related organisations,
  - ❖ Corporate Friendship – larger mills and companies
  - ❖ Archive Patronage – an exclusive group willing to generously support
- Within a year Archive has doubled income from Friends organisations.





# ARCHIVES+ MANCHESTER CENTRAL LIBRARY

# Case study: Archives+ in Manchester

- 2015: Manchester's Central Library re-opened after a multi million pound refurbishment
- HLF grant of £1.55m to "transform public access" to its archives.
- Archives+ created an archive centre of excellence in the heart of Manchester – a “City Centre showcase”
- **Partnership of statutory, university and voluntary organisations**, engaging Manchester with its histories.





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**AND FINALLY...**



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# Friends and Volunteers long term...

- Friends and volunteers are your most loyal and committed supporters with the potential to:
  - Provide years of fundraising support
  - Include a legacy for the archive in their will,
  - Act as powerful ambassadors for your archive with their family and relations – leading to new audiences and future support
  - Provide match-funding for other funding applications (e.g. HLF, some Trusts and Foundations)

# THANK YOU



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## Fundraising for Archives



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