

SHARED Enterprise : An Investment That Paid Off



Acknowledgements

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Introduction

SHARED Enterprise is one of nine Heritage Lottery Fund Catalyst: Umbrella projects operating in the UK between 2014 – 2018. The Catalyst: Umbrella programme awarded a total of £3.46 million to nine Umbrella organisations to deliver a range of services to support heritage organisations to increase their capacity to fundraise and diversify income.

The project was created in the context of the tough economic climate, which increased the urgency for museums to better understand the range of ways they can raise funding so that they might be fit for a future that requires a more flexible, creative and self-reliant approach to income generation. The planned overall outcome of this project was to make the future of the heritage held in museums in the East of England more secure and sustainable.

Through a programme of focused support, the SHARED Enterprise project has enabled museums to learn more about different methods of fundraising, develop fundraising and income generation skills, cultivate productive partnerships with the private sector, and build commercial opportunities within their organisations. The project has achieved this by providing training and knowledge gathering opportunities for museums, including:

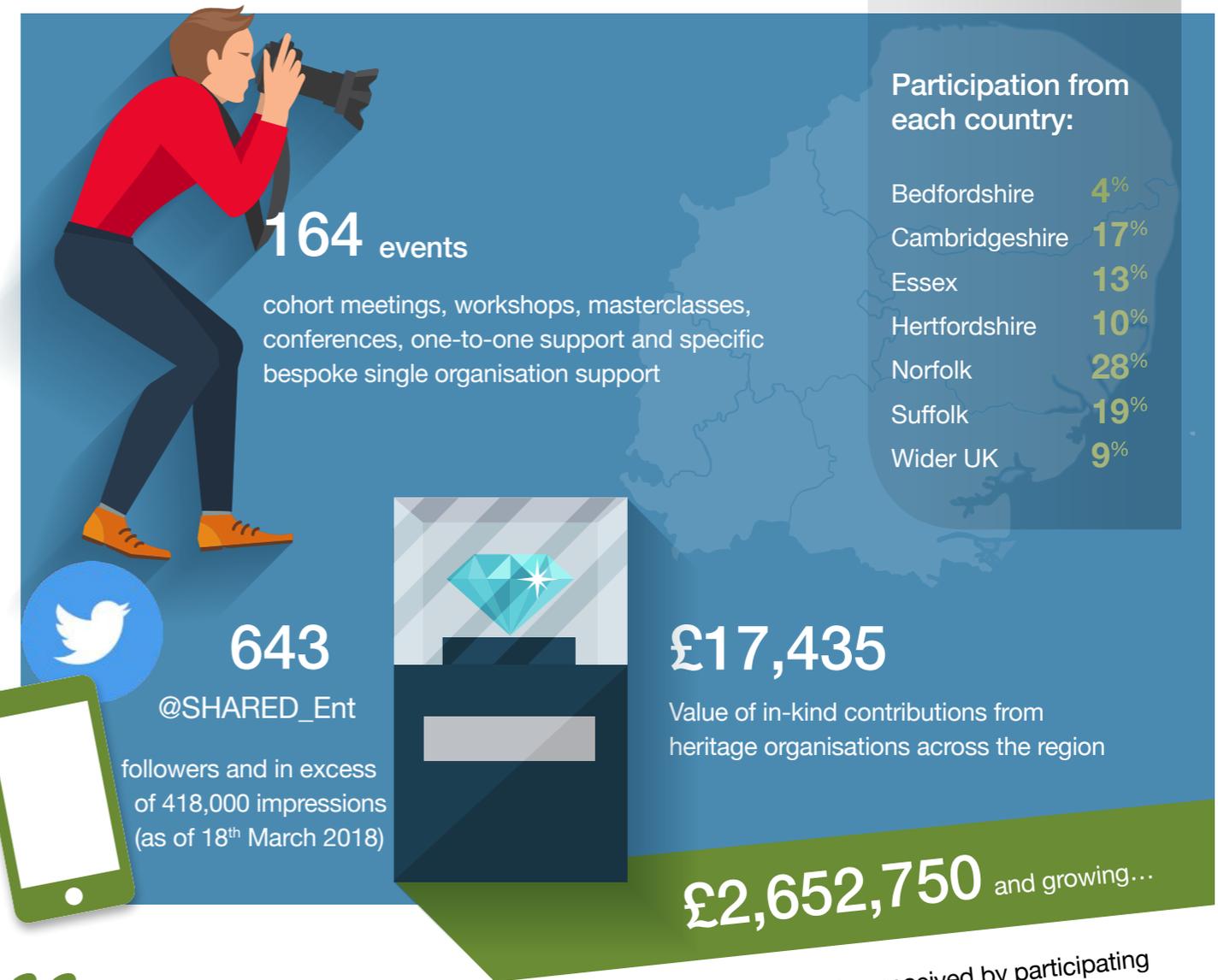
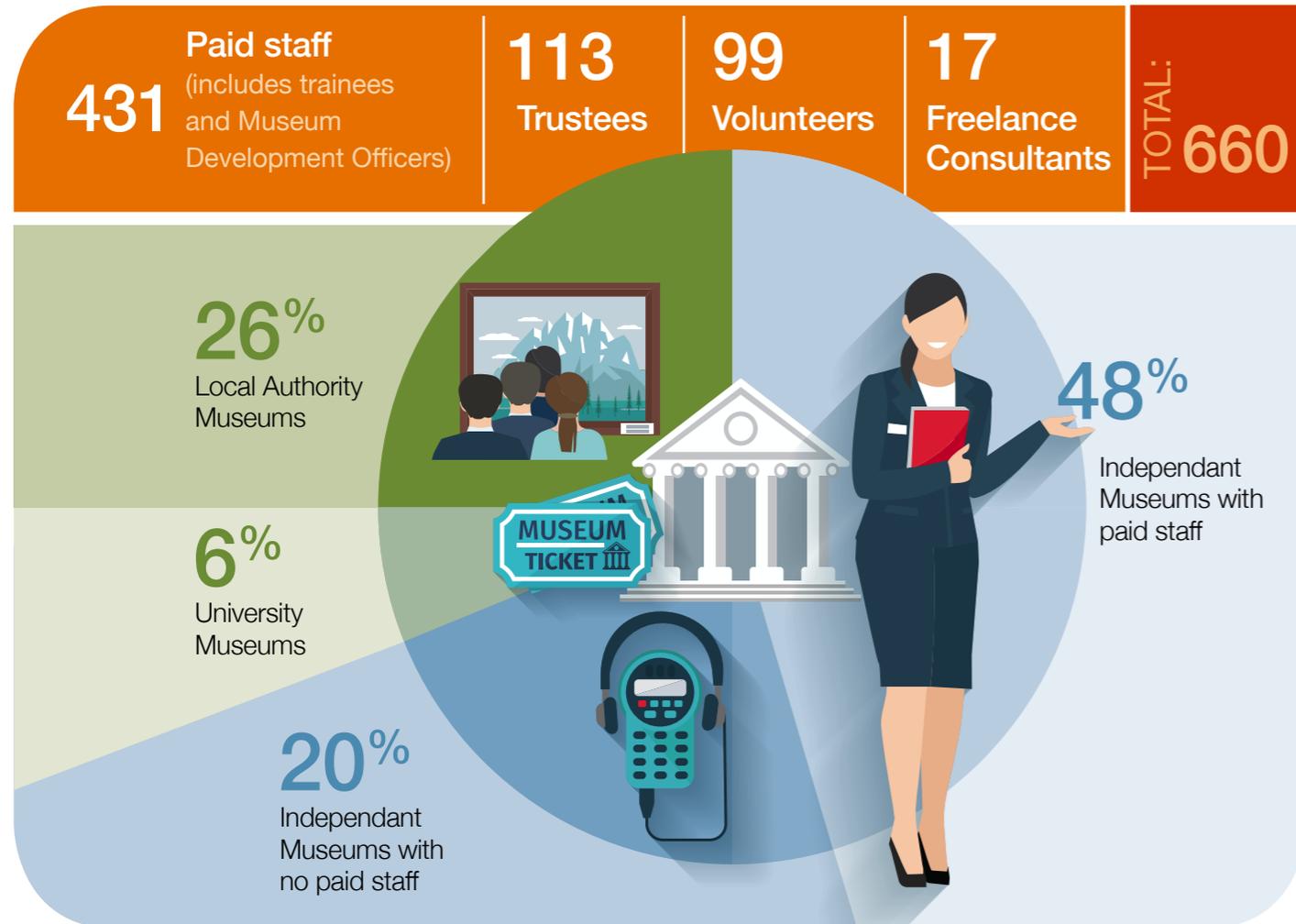
- **cohort training programmes**, in which participants worked with a fundraising consultant and each other to learn about specific areas of fundraising and share learning;
- **a programme of day workshops and seminars;**
- **events**, including a conference and funding fairs;
- **small grants;** and
- **other forms of support** (business innovator groups, specialist partner support and longer term assistance from online resources for instance)



More information and resources, including the full evaluation report can be found on the SHARE Museums East website: <http://sharemuseumseast.org.uk/shared-enterprise>

Key Project Outputs

1,259 instances of participation from 660 individual delegates representing 289 different organisations



Participation from each country:

Bedfordshire	4%
Cambridgeshire	17%
Essex	13%
Hertfordshire	10%
Norfolk	28%
Suffolk	19%
Wider UK	9%

“ Helped me focus on the job at hand; I’ve moved from ‘thinking about’ doing something to taking action. ”

the total funding received by participating organisations as a result of support from SHARED Enterprise

Cohort Training Programme



“

I've gone from zero, in fundraising skills, to writing a fundraising strategy in a remarkably short space of time. I couldn't have achieved this without SHARED Enterprise

”

There were twelve cohorts in the project that focused on:

- Developing a funding ready board
- Maximising income from commercial operations
- Fundraising strategy (delivered to five cohorts)
- Individual giving and legacy fundraising (delivered to two cohorts)
- Trusts and foundations
- HLF bids and major capital developments
- Fundraising strategies for small museums

The sessions enabled participants to learn specific fundraising theory and then turn theory into practice through group workshops and one-to-one coaching with a professional fundraising consultant. The latter was an opportunity for organisations to understand how best to apply what they had learnt, and to discuss fundraising opportunities and challenges that were most appropriate for them.

“

The personalised, expert support was helpful.

”

Participants were very positive about the experience of the cohorts and the benefits of participation:

“

Support from other cohort members was a big benefit. We networked, shared skills, gave support and solved problems together. There was a feeling of 'we can do this'

”



Training Courses: Day Workshops and Seminars

During the course of the project, 736 people participated in 45 training courses. The courses covered a wide range of subjects, including fundraising strategy, writing successful bids to grant making bodies, individual giving, legacies, crowdfunding, friends groups, good governance, commercial operations, and business partnerships.

Participants developed their knowledge of fundraising and enjoyed, and were inspired by the sessions:

“

I knew very little before the training and now I feel like I have the knowledge and skills to start.

”

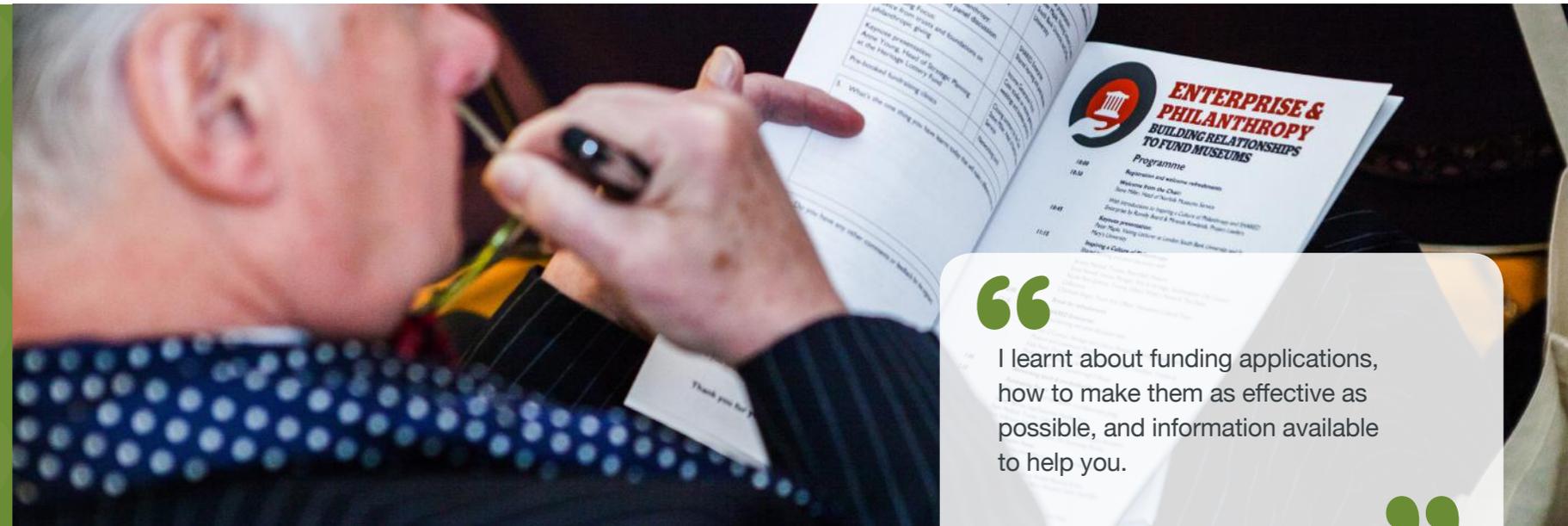


“

Very clear, even for someone very unfamiliar with fundraising. Engaging, informative, brilliant all round! Provides excellent foundation in fundraising, and definitely demystifies and makes it a bit less scary!

”

Events



“ I learnt about funding applications, how to make them as effective as possible, and information available to help you. ”

A joint conference with Hampshire Cultural Trust (also delivering a HLF Catalyst: Umbrella project), which shared learning from both strands of work, was held at the Museum of London. The conference, entitled Enterprise and Philanthropy: Building Relationships to Fund Museums, attracted 85 delegates. They said that the conference supported a variety of learning, including:

- Advice on messaging
- Better understanding of the broader meaning of ‘philanthropy’
- What funders are looking for
- How to develop lasting relationships with funders
- How to develop a business mindset
- How to develop individual giving and legacies
- The importance of relationship development and management in encouraging legacy giving

The project also delivered two funding fairs, attended by a total of 95 delegates, providing opportunities to find out more about fundraising options within the sector and share examples of good practice within the region.

Delegates indicated increased knowledge about fundraising as a result of the funding fairs:

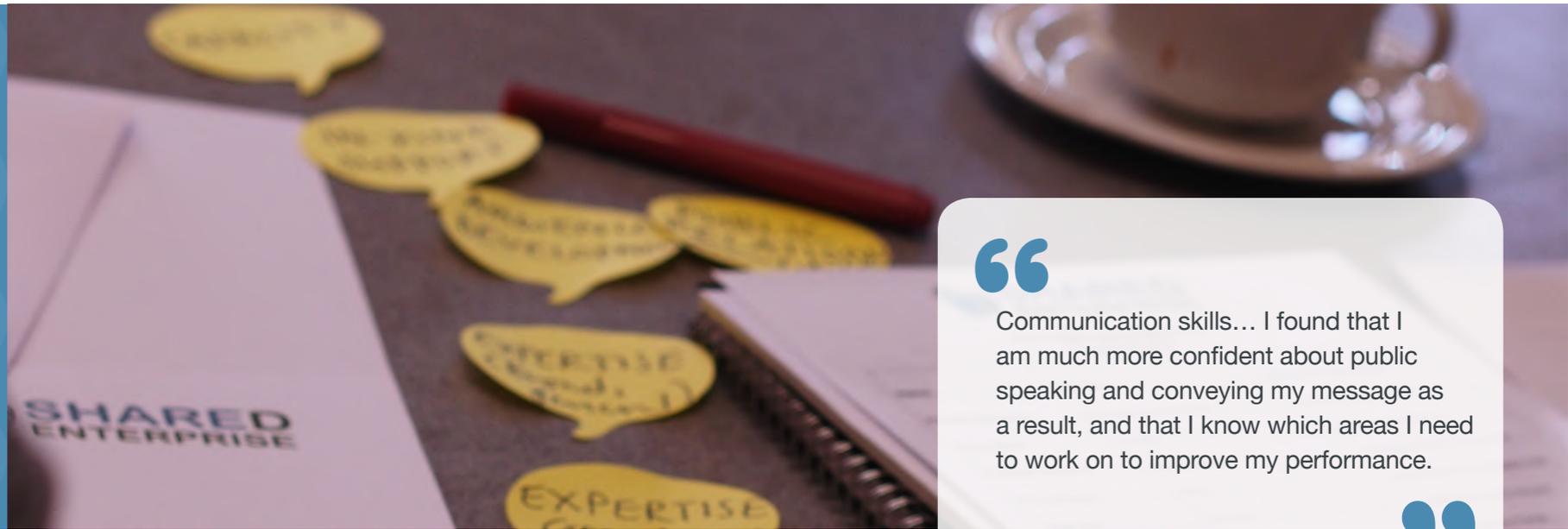
The funding fairs included trade stands from funders and major stakeholders, such as the Association of Independent Museums, Arts Council England, Heritage Lottery Fund, Local Enterprise Partnerships, Big Lottery Fund, County Museum groups, British Association of Friends of Museums, Museums Association, and the Art Fund.

“ I found out that I need to present my organisation in a unique way that stands out. ”

“ I learnt that some funders are very happy to talk pre-application and to give advice about applications. I will be braver in contacting them! ”



Small Grants



“ Communication skills... I found that I am much more confident about public speaking and conveying my message as a result, and that I know which areas I need to work on to improve my performance. ”

Thirty-nine small grants have been awarded to support 31 heritage organisations across the region undertake small fundraising and income generation projects. Grants were awarded for projects that related to developing commercial operations, individual giving, legacy giving, general fundraising strategy, governance, and marketing. In excess of £66,300 was awarded in small grants.

The small grants programme enabled museum staff and volunteers to put learning into practice and to take risks and try things out on a small scale.

Evaluation showed that grant recipients had learnt a great deal from delivering their projects, and have been able to create something physical that has put their organisation in a better place for fundraising and income generation, (e.g. bequest leaflets, donations boxes, cultivation events, and marketing materials). These are important project legacies that SHARED Enterprise has supported.

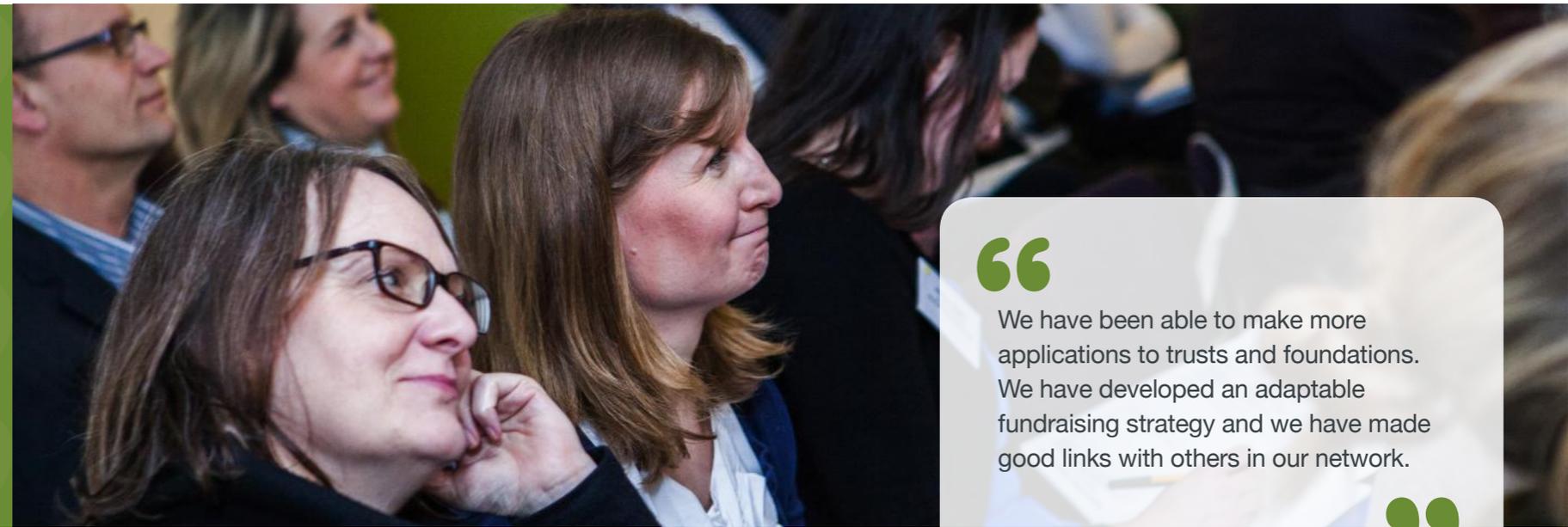
Additionally, bursaries were given to four individuals from four different organisations to attend the National Arts Fundraising School. As a result, they picked up new knowledge and skills and felt inspired to put their learning into practice in the future.

“ I have already submitted an application for funding following the course and made a small, but successful, ask to a donor. ”

“ I discovered compelling reasons for going into legacy fundraising and considered good practice from other arts organisations in this area. ”



Other Forms of Support



“ We have been able to make more applications to trusts and foundations. We have developed an adaptable fundraising strategy and we have made good links with others in our network. ”

Business Innovator groups

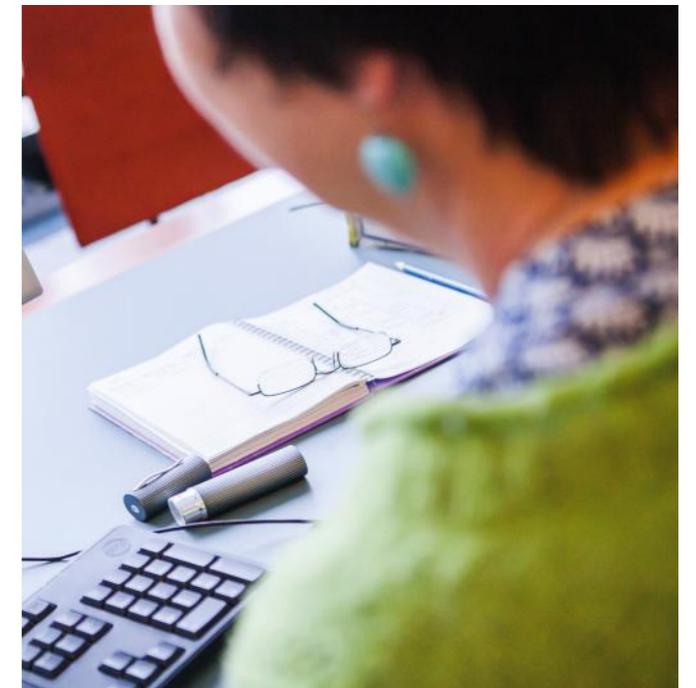
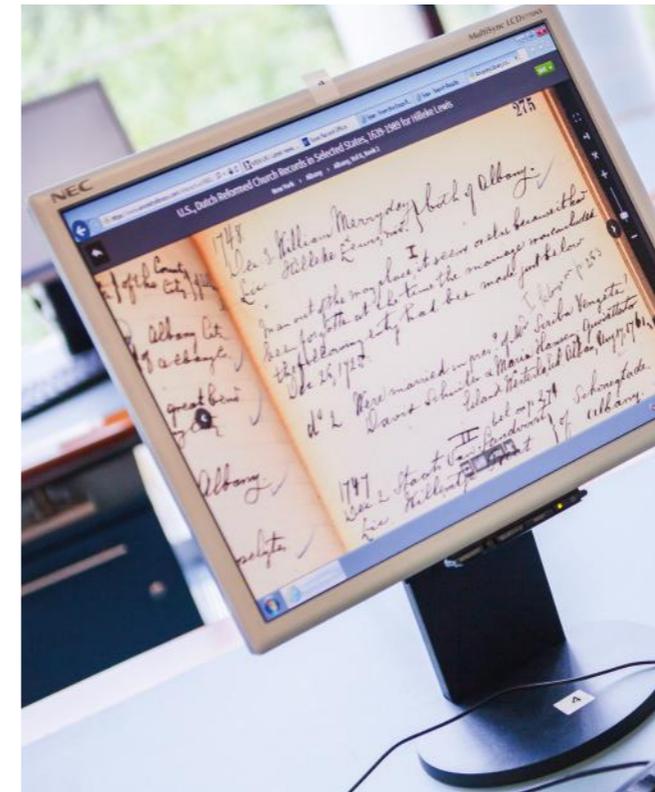
The group explored mutually beneficial ways of working in partnership with businesses. Participants learnt about the benefits of working with business partners and were supported to develop business plans and approach potential partners. Successes include Gainsborough's House developing a fruitful partnership with the neighbouring silk mill 'Vanners Silk Weavers', and the Museum of East Anglian Life developing an on-site weddings offer.

“ Very thorough advice and facts on legacy giving and how to approach this area of fundraising. ”

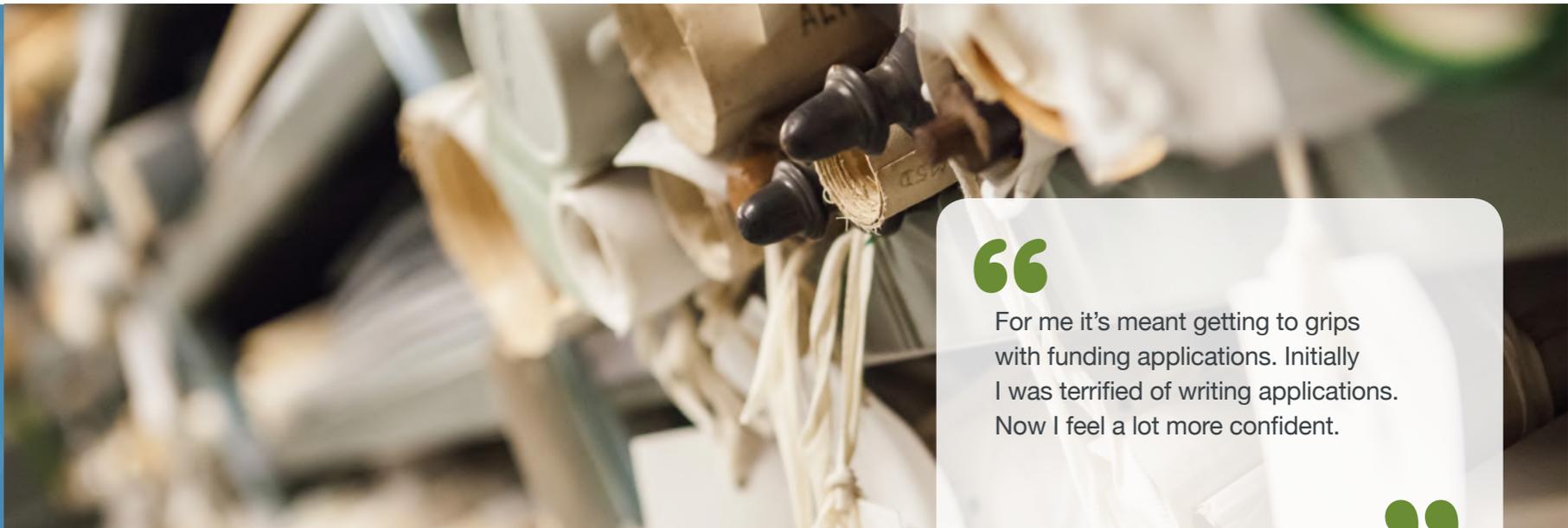
Working with specialist partners

The project aimed to enable organisations to work with specialist consultants and partners, who could provide expert, and, at times, tailored, fundraising advice. External consultants were engaged during the project to provide support in fundraising, commercial operations development (retail, catering, venue hire), governance development and staff/management coaching. Other consultants also provided services in evaluation, design, filmmaking and photography.

There are also a number of ways in which the project will be supporting organisations longer term, for instance with learning resources, advocacy tools and a fundraising network. These are covered later under 'Project Legacies'.



What difference has the project made?



“

For me it's meant getting to grips with funding applications. Initially I was terrified of writing applications. Now I feel a lot more confident.

”

Evaluation has demonstrated that the project has had significant outcomes for people, communities and heritage:

People (paid staff, trustees and volunteers)

1. have developed new skills, knowledge and confidence, and have learnt from and shared their experience and successes with others.
2. are more skilled in creating a funding strategy for their organisation, and the project has directly led to the creation of fundraising strategies that are now in use.
3. are more skilled in asking for money from private sources and understand more clearly what they have to offer in return to these sources.
4. have a clearer understanding of the fundraising opportunities afforded by their various activities, and have increased the amount of sources from which they gain funding.
5. have been encouraged to think creatively about raising funds and better understand how to improve their retail and events offer.
6. The development of fundraising strategies and the increase in people's knowledge and skills around fundraising suggests that people are now better equipped to withstand threats and to adapt to changing circumstances.
7. The evidence suggests that several participating organisations now have stronger governance and a better understanding of fundraising at a strategic (trustee) level.

“

Great, informative training session. Well-structured and engaging.

”





“ The cohort has been a catalyst for change – it has inspired our team to raise more money and we feel more supported by our trustees. People working and volunteering for the museum are energised and have new belief in our ability to fundraise. ”

Communities

1. A survey completed by SHARED Enterprise project participants suggests that some locations have experienced positive economic benefits locally through attracting visitors to the area. In addition, 212 volunteers have participated in the project.
2. The organisations that worked in partnership with local businesses and organisations benefited from sharing skills and knowledge with their business partners.

“

Through participating in the project we now have stronger engagement with volunteers, and the introduction of processes and incentives to promote fundraising.

”

Heritage

1. Improved knowledge and understanding of fundraising, associated with increased skills and confidence, and the development of tangible and long-term outputs such as fundraising strategies, suggest that the future of the heritage held in museums in the East of England is more secure and sustainable. This was an enormous ambition, and it is perhaps too early to tell whether the heritage is secure and sustainable in the long-term, but the project has certainly helped organisations become more resilient and prosperous.
2. Many museums have learnt how to access private funding sources, built productive partnerships with the private sector, and have developed relationships with private investors and business. Learning from these museums has been disseminated to the sector via case studies and learning resources.
3. Some of the participating museums have become more resilient, more adaptable, and are better able to explore how their offer makes them attractive for investment. The cohort model and one-to-one support has been the most effective way to bring about these changes, through intensive, tailored expert support within a supportive peer network.
4. Working with professional fundraising organisations has led to museums developing stronger strategies for fundraising, ensuring that fundraising becomes embedded in organisations' forward and business plans.
5. Staff, volunteers and trustees are equipped with new knowledge and some have invested this knowledge back into the sector through events and by creating case studies.

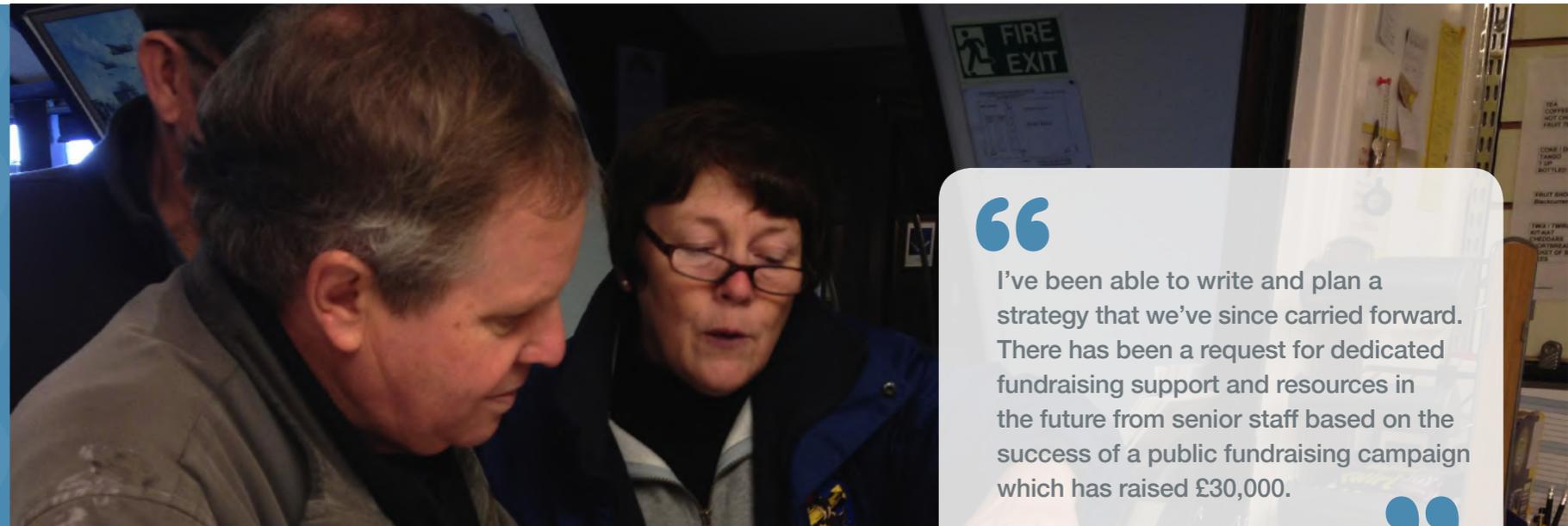
Dissemination has taken place via word of mouth/peer-to-peer learning, information and advocacy tools, learning resources and events and conferences. The learning resources are available to download for free from the SHARE website and are a permanent project legacy (see over).

“

I will be making a number of applications to trusts and foundations over the coming months.

”

Lessons Learnt: Barriers to Fundraising



“

I've been able to write and plan a strategy that we've since carried forward. There has been a request for dedicated fundraising support and resources in the future from senior staff based on the success of a public fundraising campaign which has raised £30,000.

”

The SHARED Enterprise project has had great successes in supporting those working at small and medium heritage organisations to develop fundraising skills and become more confident fundraisers. Despite this, several barriers to fundraising do still exist and need to be tackled by initiatives such as SHARED Enterprise and the wider sector. These are explored below with the aim of assisting the wider heritage sector to consider how we can work together to try to overcome them.

General understanding of different methods of fundraising is lower than anticipated.

- Significant numbers of museum trustees do not understand their responsibility as fundraisers, are reluctant to lead, get involved with or support fundraising activities. This too can be seen amongst other people working in the heritage sector who feel disinclined to ask for money.
- It takes time to develop fundraising skills and to embed these skills within organisations and for boards to change and develop. Being able to articulate funding needs and having the right skills to be able to take discussions forward and to cultivate contacts is essential.
- It is not easy to articulate a fundraising goal and create a case for support. Developing relationships with the private sector can be time consuming; even confident, professional people find this difficult and need support. Specialist advice and/or training on how to be confident in approaching businesses or donors can be helpful.
- Capacity for fundraising within an organisation can be a big barrier. Many museums rely on volunteer support and part-time staff who are not able to dedicate much time to fundraising.

This also applies to larger museums, where funding cuts have led to reductions in staffing levels and increased workloads for remaining staff who must then also balance fundraising with existing responsibilities.

- Perceived lack of capacity is an equally big barrier. There is a generally held, inaccurate perception that smaller museums cannot fundraise effectively without a team of professional fundraisers. In reality, only the largest national museums have such resources. SHARED Enterprise worked hard to challenge this unhelpful notion through bespoke training that helped people understand how to scale fundraising activities to suit their organisation's needs and resources.
- Under-charging for services like curator talks and venue hire is quite common, and a missed opportunity for income generation.



Project Legacies



“ We are looking at different projects where it might be appropriate to fundraise through individual giving. This will help raise the profile of the museum. ”

The project has produced a wide range of legacies that will continue to have longer term and positive impacts in the future:

- As individuals have learnt knowledge and skills, and have more positive attitudes towards fundraising, including increased confidence, this will support their organisations (and their future organisations, if applicable) to continue to be income-generating and resilient in to the future.
- Business partnerships have been built, some of which – for example, Gainsborough’s House/ Vanners Silk Weavers partnership - look like they will continue in the future.
- Organisations have developed, or are in the process of developing, long-term fundraising strategies.
- Organisations have created outputs that will support them to continue to raise money and generate income in the future. Outputs include donations boxes, fundraising leaflets and other marketing material, membership databases, implemented Gift Aid, fundraising pages on websites, income-generating offers e.g. wedding offers, and retail products. Two particularly impressive outputs, resulting from advice given by the SHARED Enterprise Project Officer, are the opening of Museum 4 Watton following a £61,300 HLF grant and the creation of a Girlguiding archive resource centre following a £60,000 HLF grant. In addition, de Havilland Aircraft Museum, which took part in several strands of SHARED Enterprise, has been awarded a £1.9 million HLF grant for its ‘21st century project’.
- A potential fundraising network, comprising a voluntary team of fundraising advisors. Although this is still in the planning stage and its development is subject to SHARED Museums East facilitating it in the future, it is hoped that it will provide expert, tailored advice to the region’s heritage organisations once the SHARED Enterprise project has come to an end. The advisors are individuals with a proven track record of successful fundraising, who received high-level fundraising training from The Management Centre, paid for by SHARED Enterprise.
- Information and advocacy tools have been created through the project to share learning widely across the museum sector. There is a comprehensive bank of 53 learning resources and case studies, as well as a short film and an advocacy and fundraising best practice booklet. The resources are wide-ranging, addressing diverse topics including information about funding organisations, behavioural economics, case for support, venue hire, and a governance health check.

The resources can be downloaded for free via the SHARED website: www.sharemuseumseast.org.uk/shared-enterprise-resources

Where next?

SHARED Enterprise has successfully shown that offering training and events, providing small grants and creating opportunities to develop meaningful partnerships with a focus on income generation and fundraising, can help organisations become more financially secure and sustainable.

If you are feeling inspired to learn more about some of the topics explored in this publication, the list below covers where you can access more information and apply for grants specifically aimed at making museums and heritage organisations more resilient.

Further information about the Catalyst: Capacity Building initiatives and their impact can be found at www.hlf.org.uk/catalyst-capacity-building-programme-evaluation

SHARE Museums East offers a library of free resources, including a whole 'virtual bookshelf' on resilience www.sharemuseumseast.org.uk/resources

The Association of Independent Museums (AIM) Sustainability Grant Scheme is aimed at smaller and medium sized AIM members to improve their medium and long term sustainability www.aim-museums.co.uk/for-aim-members/grants/aim-sustainability-grant-scheme

Arts Council England has a rolling programme of funding opportunities which can be accessed at www.artscouncil.org.uk/funding

The Heritage Lottery Fund offers grants through its Resilient Heritage strand. This is available to organisations in the UK who want to build their capacity or achieve strategic change to improve the management of heritage www.hlf.org.uk/looking-funding/our-grant-programmes/resilient-heritage



Thank you for
supporting the
museum

Contact us

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