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Contents

| 01 | Introduction |
|-----------|--|
| 05 | Case Studies |
| 07 | Ely Museum Planning and Running Your Campaign |
| 09 | Museum of East Anglian Life Getting Your Message Right |
| 11 | The Fry Art Gallery Advocacy and Making the Ask |
| 13 | Essex Record Office Encouraging Individual Giving |
| 15 | De Havilland Aircraft Museum Legacy Giving |
| 17 | Cambridge Museum of Technology Running a Crowdfunding Campaign |
| 19 | Norwich Castle Museum and Art Gallery A Public Fundraising Campaign |
| 21 | Gainsborough's House Cultivating and Maintaining Business Partnerships |
| 23 | John Bunyan Museum Developing Your Retail Offer and Improving Your Donations Box |
| 25 | Epping Forest District Museum Developing a Commercially-Minded Organisation |
| 27 | Final Thoughts |

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 the Umbrella organisations to deliver a range of services to support heritage organisations to increase their capacity to fundraise and diversify income.

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 develop commercial opportunities within their organisations. The project has achieved this by providing training and knowledge gathering opportunities for museums, including:

- conferences;
- 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;
- one-to-one consultancy support; and
- small grants.

Topics covered in training included developing a fundraising strategy, writing successful bids to grant making bodies, individual giving, legacies, crowdfunding, friends groups, good governance, commercial operations, and business partnerships.

Since the project began in 2014 to the time of writing in July 2017, the project has reached 583 people from 260 organisations mostly from the East of England. Initially funded for two years, the project was granted additional funding from the Heritage Lottery Fund to continue until 2018.







Case Studies



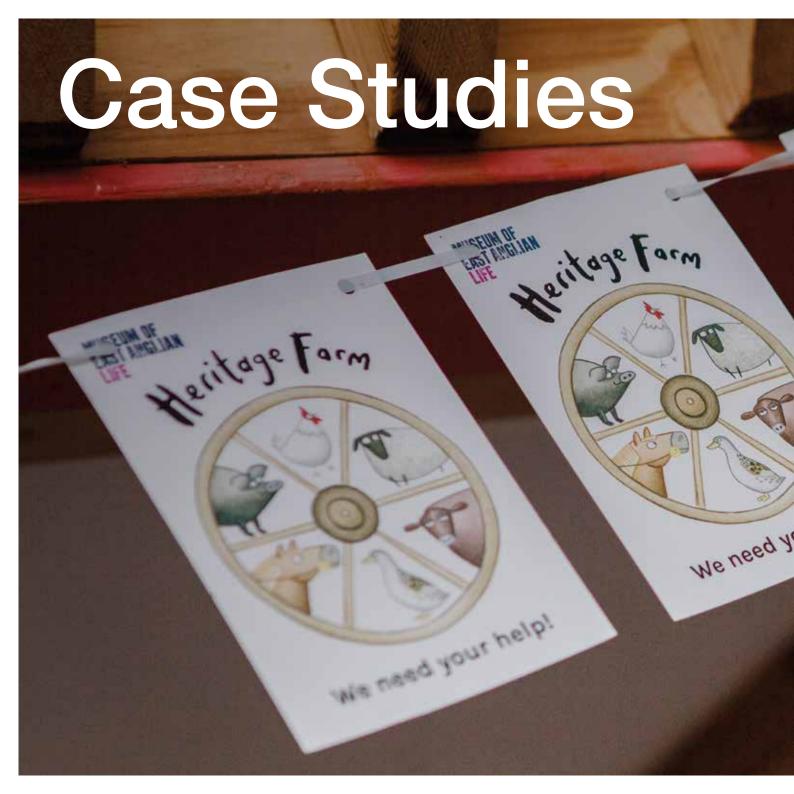
We have set out ten case studies that illustrate a range of approaches that could be adopted by museums, art galleries, archives and other cultural organisations. Each organisation that has been featured took part in at least one element of the SHARED Enterprise project, including participating in cohorts, attending training, and exploring business partnerships. It is hoped that the case studies will provide inspiration for others who wish to improve their fundraising, generate more income and become more entrepreneurial.

We acknowledge that other organisations may not be able to exactly replicate the practice that is illustrated in the case studies, therefore we have drawn out broad best practice in a series of 'top tips' sections.

Lessons Learned Different approaches work for different museums. Be prepared to take managed risks but ensure your fundraising efforts are right for you and your audiences. The cohort model has been particularly successful, enabling organisations to benefit from tailored, expert advice, and building a peer network that provided accountability and support. Most organisations that participated in the cohort sent at least two members of their team, including trustees, to the sessions; this helped gain whole-organisation buy-in and embedded a fundraising mindset within organisations. If you are unable to create formal cohorts, consider whether you could set up informal networks of organisations looking to improve their fundraising skills. The project enabled organisations to access paid-for professional fundraising advice from specialist consultants, which organisations credited with helping increase their knowledge and boost their fundraising efforts. If your museum cannot afford to engage a specialist fundraising consultant, consider whether you might be able to work with other museums to buy their time.

A single point of contact, our Project Manager, made it easier for participating organisations to access one-to-one advice and information.

Fundraising is hard work and there are not any shortcuts or magic wands that will lead to quick fundraising success, so it is vital to get everyone in an organisation involved in fundraising, especially trustees.





Ely Museum Planning and Running Your Campaign

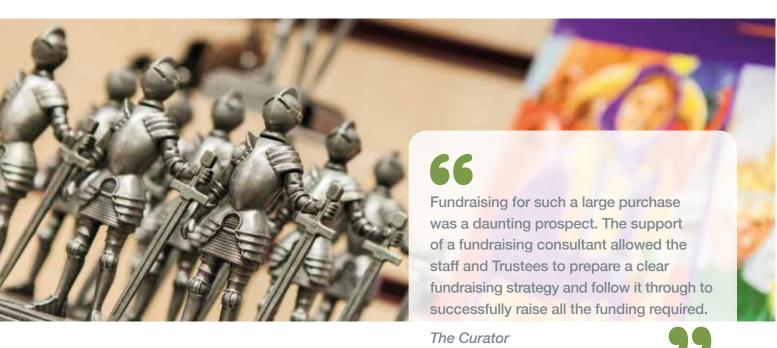


Ely Museum is an independent museum that tells the history of the Isle of Ely and the Fens from prehistory to the 20th century. The organisation is funded by grants from East Cambridgeshire District Council and the City of Ely Council, funding from grant making bodies, admissions, and individual donations.

Museum staff and a trustee participated in a training cohort to develop a fundraising strategy. Staff felt that the cohort model was particularly helpful as it enabled different people within the museum to learn about fundraising and gain a better understanding of the amount of work that goes into raising money.

Following the advice of David Burgess, a fundraising consultant who the team worked with during the SHARED Enterprise project, museum staff now hold a campaign planning session for each fundraising project. The team start by asking key questions: What is the problem and the challenge that funders can solve? What will happen if the project does not go ahead? What does a funder want to get out of this project? This approach enables staff to present a project and a solution to potential funders, which makes for a more compelling project bid.

The team uses a Trello board to manage each project and monitor project activity. Trello (www.trello.com) is a collaborative online project management tool that enables team members to see tasks that are being worked on and who is working on them. Trello enables the museum trustees to keep track of each campaign, better understand where staff need support, and be involved in the campaign process remotely.



As a result of participating in the project, the museum is more invested in fundraising, and has created a fundraising committee. Board members have developed fundraising skills and are more able to support and lead fundraising activities.

At the time of writing, the museum team has just successfully raised £220,000 to purchase a Bronze Age gold torc that was discovered in East Cambridgeshire, regarded as the best torc found in England in more than a century. The torc was offered to the museum by the Treasure Scheme; the team had four months in which to raise the money. Funding was obtained through several trusts and foundations – the National Heritage Memorial Fund, V&A Purchase Fund, Art Fund, Headley Trust, Beecroft Bequest – and almost £8,000 was raised through local funding, including individual donations of over £500.



Top Tips

- Understand the challenge your project will solve and the solution the project offers, and relate this to funders in a compelling way.
- 2 Use digital project management tools to enable staff and trustees to take an active role in fundraising projects.
- 3 Engage trustees with fundraising projects and ensure they have the skills and knowledge needed to support fundraising efforts.

Museum of East Anglian Life Getting Your Message Right



Situated in 75 acres in the heart of Stowmarket, Suffolk, The Museum of East Anglian Life is an independent open air museum telling the stories of East Anglian lives. In 2017, the museum is in its third year of an Arts Council England supported museum resilience project, which aims to increase and diversify income through commercial activities and fundraising.

In 1967, the founders of the museum had a vision to save the farming heritage of East Anglia. In 2017, the museum's 50th year, the team developed a project to honour this vision and look to the next 50 years. The Heritage Farm will be a centre for conservation and education about rural heritage, food and where it comes from. The farm will feature rare breeds, crops, a free range poultry orchard, educational barn, family area, and improved visitor and volunteer facilities. The

project will be funded by approaching suitable funders, including trusts and foundations, major donors and a public campaign to garner community support.

Before planning the public campaign, the team sought advice from fundraising consultants through SHARED Enterprise. The team developed an urgent story about rare breeds and conservation that felt true to the founders' vision. Visitors connected with the animals already on site and it was felt that it was the animals that would motivate people to donate. The team produced promotional materials to help raise awareness of the campaign, including six poster designs, each featuring a different animal to promote that personal connection.

The team wanted to encourage individuals in the local community to donate to the museum. Community fundraising is most effective when



Staff came up with the creative idea of producing piggy banks, which visitors can purchase from the museum shop for a refundable deposit. Each pig has its own name and comes with a personalised note. Visitors are encouraged to 'adopt' a pig, take it home or to work, 'feed' it with money, and return it to the museum to support the Heritage Farm. The pigs cost the museum £3 per unit, and people can adopt them for a fee of £5. The pig has extra significance for the museum; the piggy bank was designed to look like the Large Black Pig, a heritage breed that is local to the area and one of rare breeds that will be preserved through the Heritage Farm. The museum has promoted the

campaign through social media, with pictures of

the piggy banks doing fun activities at the museum and raising awareness of rare breeds of the region.

organisations have a specific ask and are

really clear about how people can get involved.

£11,500

the team already raising around £11,500 towards their £16,000 target.



- Consider what compelling and timely reason you can offer to encourage people to donate, for example a birthday or an anniversary of something related to your collection.
- Think about what will motivate people to donate to your cause...
- Put out a strong, compelling message to potential donors and be clear about how people can donate.

The Fry Art Gallery Advocacy and Making the Ask



The Fry Art Gallery is a volunteer-run, independent art gallery and accredited museum in Saffron Walden, Essex, that houses artwork by artists of the 20th century and the present day. The gallery is funded through individual members, fundraising events, and grant-making bodies.

The project has supported the team to create an elevator pitch – a very brief, persuasive pitch that contains key messages and is used to spark interest in an organisation, project, idea or product. With their key fundraising messages to hand, trustees are more easily able to advocate for the gallery to visitors, funders and the local press. Gallery volunteers are also aware of these key messages, which they communicate to visitors without pushing for money. The team have found that this 'soft-sell' approach encourages visitors to give cash donations.

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Creating an 'elevator pitch' has meant I know exactly what to say to visitors about fundraising for the gallery. This has helped raise our profile and has helped us raise funds. I now feel confident asking for money.

The Chair of the Trustees

In 2016, trustees raised £200,000 to buy the gallery. Purchase of the freehold gives the team a great feeling of security and ensures the future of the gallery and the collection, as well as giving them the potential to extend the gallery. Understanding that their members, which number over 1,200 people, are a very engaged group, the trustees decided that this group should be the primary target market for this campaign. The campaign was launched at a private viewing for



the members. Trustees set a target of raising £75,000 from members, which felt ambitious without being overwhelming.

The team considered several potential fundraising methods via which to encourage donations from members. They decided against crowdfunding as experience had shown that members were less likely to give online and be active on social media. The Chair of Trustees, who developed the confidence and skills to successfully engage with supporters through participating in SHARED Enterprise, wrote to all members asking for support to help buy the gallery. The campaign raised £150,000, hugely exceeding the original target. Successful applications to grant making bodies helped the trustees raise the remaining money required to buy the gallery.



Top Tips

- Create an 'elevator pitch' for your organisation. The pitch should not last more than 20 to 30 seconds and communicate who you are, what you want to do and why it is important. What key messages do you want to communicate to potential donors?
- 2 Cultivate relationships with individuals and look for opportunities to ask for donations.
- 3 Utilise fundraising methods that best suit your organisation and audiences. Ensure that everyone on the team has the skills and knowledge needed to support fundraising efforts.

Essex Record Office Encouraging Individual Giving



Essex Record Office (ERO), which is run by Essex County Council, cares for documents, maps, images and sound and video recordings that tell the story of nearly 1,000 years of Essex history. ERO receives part of its funding from the Local Authority but has always generated additional income through, for example, digital reprographics and public engagement activities.

In 2016, with support and training from the SHARED Enterprise project, the ERO began to focus on becoming more entrepreneurial and income-generating in order to become more financially resilient. Staff have been involved in several fundraising activities.

One member of staff has started to lead the creation of a fundraising strategy for ERO which will support an organisation-wide approach to fundraising. The strategy is being written in consultation with senior

management, other members of the team, and the ERO's Friends Group.

ERO has launched an individual giving webpage, which can be accessed via a 'Support Us' button on the home page of the organisation's website. Supporters are able to donate directly to ERO through the webpage. The webpage suggests three levels of donations, and donors are also able to give an amount of their own choosing. The webpage also explains what each gift level could help ERO to do:

- £5 could buy an acid-free box to safely store documents that record the history of Essex
- £26 could pay for crafts and fun learning resources for classroom visits
- £100 could pay for the repair and preservation of fragile historical records



Each suggested amount is accompanied by a photograph that gives potential donors a visual image of the sort of item or service that their money will support.



- understand the impact their donation will have on your organisation and those your organisation supports. Offering defined choices, or suggestions, also gives donors a better understanding of what might be considered a small or larger contribution.
- Using an online giving site which shows how much other people are donating can drive up average donations as people will look to see what others are giving and usually give a similar amount.
- Monitor the amount individual donors give and, if required, alter the suggested giving amounts. For example, if you find people tend to give much more than your lowest suggested amount, you might increase this amount.

De Havilland Aircraft Museum Legacy Giving



The De Havilland Aircraft Museum in London Colney, Hertfordshire, is the oldest aviation museum in the UK dedicated to the preservation and display of de Havilland Aircraft. The museum is independent and volunteer-run.

SHARED Enterprise was a catalyst for the museum team trying different income generating activities, including legacy giving.

The museum team produced a film that appealed for individual donations to support the development of a new hangar in which to house aircraft from the collection. The film is on the museum's website.

After attending a legacy giving workshop, the team received a small grant from SHARED Enterprise to create a leaflet encouraging people to leave a gift in their will to the museum. The leaflet is distributed to local solicitors' offices and is given out at events and in the museum. The key message of the leaflet is that legacies help to preserve the heritage of the site for future generations. Images used in the leaflet reflect this message, featuring a grandparent and child. The leaflet clearly explains what people need to do in order to leave a legacy. The museum's website also includes a page with information about legacy giving.

Prior to participating in the SHARED Enterprise project, the museum tended to mainly generate income through admission fees and visitors' donations on-site. The museum team has since had great fundraising success, raising £67,000 from the Heritage Lottery Fund, £10,000 in legacy donations, and £25,000 from other individual donations.

For many supporters, leaving a gift in their will is a natural progression from lifetime giving. The museum successfully encourages people to donate in various ways, including a 'Buy a Plaque' scheme,



which enables individual donors to buy an engraved brass plague that will be permanently displayed in the new aircraft hangar. The scheme is featured in the museum's legacy leaflet and on its website, so both lifetime giving and legacy giving are promoted side by side. The 'Buy a Plague' scheme has so far generated over £6000 in donations.

A fundraising strategy must have many targeted potential donors and legacy giving needs to be promoted alongside other ways of supporting the museum.

Museum Trustee



- Legacy giving is a potentially very rewarding source of unrestricted income. Have a leaflet or a page on your website promoting legacy giving, sensitively targeting your existing supporter base they are the people most likely to want to leave you a gift in their will.
- Distribute your legacy giving leaflet to local solicitors' offices. When people go to make a will, the solicitor may ask them if they have considered leaving a gift to charity. Whilst they can't make any specific recommendations, they can offer local charities' leaflets to browse.
- There are a lot of misconceptions about legacy giving. It is worth finding out how to promote legacy giving well. Get the facts and find out how it works by attending training or from books and online resources on the subject.

Cambridge Museum of Technology Running a Crowdfunding Campaign

The Cambridge Museum of Technology is the old pumping station for the city of Cambridge. The museum, which is independent, preserves and exhibits material that is relevant to the Cambridge area, either by its use or invention.

The project gave the museum team the confidence to run a crowdfunding campaign on Indiegogo. The museum was given the opportunity to lease a building on-site - the Engineer's House - on the condition that the museum restore the house. The Engineer's House was built in 1898 to house the engineer who worked at the pumping station. Once restored, the house will be part of the museum and will provide meeting space, an archive/library, and a space for education.

Staff discussed the possibilities of a crowdfunding campaign with the SHARED Enterprise Project Officer who offered ideas and advice, including

around the type of rewards that the museum might offer to donors. The rewards ranged from a roll of turf for a £4 donation, to lifetime membership for a £500 donation. Other perks included £10 for a set of limited edition postcards, £25 for listing a name on the donor roll at the Engineer's House, and £50 for a signed limited edition print by a local artist.

The campaign page clearly explained the fundraising campaign and set out the difference donations would make. The page also included photographs of the house.



The museum ran a successful crowdfunding campaign that raised nearly £1,700, which is supporting the team to restore the Engineer's House.



The Curator – highlighting another benefit of the crowdfunder



- People need to care about your crowdfunding campaign. You are more likely to get donations if you present a real, tangible problem that donations can solve or if you create a product that people want to support.
- Perks, or rewards, are vital. These do not have to be hugely costly. What can you offer to encourage people to donate?
- 3 Start raising awareness before you start the campaign and, once running, make the campaign a high priority. Crowdfunding campaigns should preferably be around 6-8 weeks, and definitely no longer than 3 months. Short timescales help campaigns to maintain a sense of urgency, and make it easier for staff and volunteers to sustain momentum.

Norwich Castle Museum and Art Gallery A Public Fundraising Campaign



One of Norwich's most famous landmarks, Norwich Castle was built by the Normans as a Royal Palace 900 years ago. Today it is home to an award winning museum and part of Norfolk Museums Service, a local authority service operating 10 museums and a study centre in Norfolk.

Gateway to Medieval England is a major capital development that will transform the Castle's Norman Keep back to its original form. This £13.5m project has included a pledge of £9.2m from the Heritage Lottery Fund and much of the funding for the shortfall has been raised through traditional methods such as grants from trusts and foundations. Staff at Norwich Castle have considerable experience of writing funding bids but they have never embarked on such an ambitious public fundraising campaign before.

Launched in September 2017, 'Keep Giving' aims to raise £50,000 towards the project.

The timing of a public campaign is vital, so the museum team decided to launch the appeal when over 90% of the funds were already raised, asking the public to help with the last fundraising push, through various different channels.

'Keep Giving' uses a donation-based crowdfunding platform whilst also enabling donations by text, by post or in person. The project team chose several methods of fundraising they haven't thought about before, including the innovative 'Adopt an Object' scheme, which offers donors exclusive benefits.

To market the campaign and spread awareness they are using social media, a dedicated website, special events and merchandise such as badges and bags. A special display on site provides information about the project and includes a



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We applied the learning from SHARED Enterprise training to the development of the Keep Giving public appeal. The appeal is more creative and more ambitious as a result and it has given us confidence that we will achieve our fundraising target.

Head of Development – Norfolk Museums Service

digital totalizer that is updated regularly. The museum is also working with a media partner to help maintain a regular presence in the local press.

It is important to make it as easy as possible for people to donate or be part of the project. Taking inspiration from their SHARED Enterprise training, the museum team developed a campaign leaflet clearly explaining how donations will be used, and offering a variety of ways to donate. The campaign leaflet prominently carries a celebrity endorsement from Stephen Fry, the project's patron. Attracting celebrity patronage is another first for the museum.

The public campaign isn't just about the money but will help to build lasting relationships and partnerships with local organisations as well as cultivating community excitement and engagement with the project.



Top Tips

- A celebrity endorsement can make a huge difference to a public campaign, further legitimising the ask and widening your audience.
- 2 It is important to keep people interested in your project. This is why it is a good idea to build a relationship with your local press and plan regular press releases to share information and updates as the project progresses.
- A clear social media strategy is imperative in engaging audiences and creating a buzz around your project.

Gainsborough's House Cultivating and Maintaining Business Partnerships



Gainsborough's House is located in the former childhood home of Thomas Gainsborough (1727-88) in Sudbury, Suffolk. The museum, which is independent, promotes the wider knowledge, appreciation and enjoyment of the art of Thomas Gainsborough within the context of the 18th century and the inspiration of the Suffolk landscape.

SHARED Enterprise has helped the staff of Gainsborough's House to work more creatively, with local businesses. Prior to participating in the project, the museum had a good relationship with a local silk mill that is located next to the museum, and staff wanted to develop this relationship. Sudbury is at the heart of the silk industry; 95% of woven silk comes from the town.

The silk mill has donated silk to the museum's collection and offered expert advice on silk.

Museum staff have been allowed to give potential

funders special tours around the silk mill. The silk mill has given the museum a piece of land, which is located next to the museum, that museum staff hope to develop as part of a major project. Silk mill staff have also introduced museum staff to other business people.

Museum staff develop relationships with businesses by focusing on people.



It's all about people. We invite business people to the museum, give them coffee and refreshments and a tour, talk about our future plans, and explore ideas with them. Meeting people in the museum is crucial as this starts to build a relationship.

The Director





Once relationships have been established, museum staff send regular updates to business partners and involve them with project consultations. Businesses who contribute cash or in-kind support are thanked and their contributions publicly acknowledged.

Museum staff also successfully gained funding from the John Ellerman Foundation to develop a map and trail around Sudbury and the surrounding area. The map highlights all the historical locations that relate to Gainsborough and inspired his work, and features the museum and local businesses. The aim of the 'Gainsborough's Sudbury' trail is to encourage cultural tourists to stay in the area overnight and spend more money in the local economy.

- When building relationships with businesses, put people first talk to business people, invite them to your venue, offer them refreshments, talk to them about your plans and discuss how they might be able to support these plans. Think about what you can offer to businesses, for example, meeting spaces, private views or tours, or corporate hospitality.
- 2 Consider cash and in-kind contributions that businesses may be able to donate to your organisation. In-kind contributions could include, for example, advice, objects, space for meetings, and introductions to others.
- Once you have built relationships with businesses, make sure you maintain the relationship by keeping in touch with contacts and letting them know about future projects and plans.

John Bunyan Museum Developing Your Retail Offer and Improving Your Donations Box



John Bunyan Museum in Bedford depicts the life and times of author, pastor and preacher John Bunyan, his early life, imprisonment in the town and his legacy. This independent museum also houses a library, which comprises over 2,300 items, including the writings of John Bunyan and his contemporaries. The museum has free admission; donations and shop sales are the only source of income from visitors.

The museum team wanted to increase the organisation's income through retail activity. The SHARED Enterprise Project Officer visited the museum shop to provide an objective perspective on the space and how it might be improved. This appraisal found that the shop desk was almost blocking the entrance to the shop, which made the shop feel 'off-limits' to visitors. Moving the desk, a relatively minor change, has made a big

improvement to the shop, which is now easier to enter and navigate. New fixtures and fittings have also improved the look of the shop.

The museum team worked with a retail consultant to identify several higher-end products to sell in the shop, including a range of hanging stained glass windows featuring John Bunyan, and jigsaws for adults, which are selling particularly well. In addition, the team looked at what items were selling well and ensured the shop continued to stock these items, as well as reducing slow selling lines for clearance. They have begun to monitor Key Performance Indicators (KPIs) like spend per visitor and average transaction value to help measure the shop's performance.

In addition to developing the shop, the museum purchased a new donations box with the help of grants from SHARED Enterprise and the



museum's Friends Group. The box, which is made of perspex to enable visitors to see donations that have been given, is on a stand that makes it more visible. Behind the box is a large poster that makes it clear that the museum relies on donations and asks visitors to donate.



- Ask independent volunteers to conduct 'mystery shopper' visits to your shop to find out if the layout and retail offer could be improved. SHARE Museums East runs a mystery shopper scheme which allows museums to benefit from an objective assessment of their visitor experience. For more information about the scheme, please contact sharemuseumseast@norfolk.gov.uk
- 2 Keep a detailed stock inventory and weed out any items that do not sell well. Stock that is stuck in cupboards is just taking up room and not making you any money. Ensure you have a balance between low and high priced items.
- 3 Position your donations box somewhere that is uncluttered so the box is easy to see and access. Perspex boxes work well as visitors are more likely to make a donation if they can see money in the box, and if they see notes, they are more likely to give notes.

Epping Forest District Museum Developing a CommerciallyMinded Organisation



Epping Forest District Museum is housed in Grade II* listed Tudor building in Waltham Abbey, and tells the story of the district. The museum is run by Epping Forest District Council, which also runs Lowewood Museum on behalf of Broxbourne Borough Council and supports North Weald Airfield Museum.

The museum team wanted to increase fundraising and commercial activity in order to take forward projects, pay for core costs, and become more financially resilient. Two members of staff participated in SHARED Enterprise cohorts and training sessions, then relayed what they had learned to the rest of the team. Every member of staff supports income generation and feels empowered to carry out this work.

The staff have led several income-generating activities, including auditing and refreshing stock in the shop, which has led to increased shop sales, and setting up a membership scheme.

All the team advocate for the museum to visitors and ask them for donations. Staff give a clear and positive message to visitors that giving money to the museum will enable them to continue, and build on, their work, and will help secure the long-term future of the organisation. This approach has led to an increase in on-site donations.

The management team have embedded a commercial mindset by including discussions about income generation in team meetings and individual reviews. Income generation targets are set where appropriate. Staff are encouraged to put forward ideas for projects and activities that might support income generation and to look outside



the museum for fundraising best practice that could be adopted by the organisation. This wholeorganisation approach to income generation has been key to its fundraising success.



Top Tips

- 1 Leadership is important. Leaders need to advocate for the importance of income generation and empower and inspire their staff to support fundraising efforts.
- 2 Empower staff and volunteers to take ownership of fundraising by enabling them to put forward and try out income generating activities.
- Make sure that fundraising is a core item on the agenda of team meetings and individual reviews.

Final Thoughts

The SHARED Enterprise project has demonstrated that, with the right support and hard work, organisations of all sizes and types can become more income-generating, secure and sustainable. Many of the organisations we have worked with now have stronger strategies for fundraising and have embedded fundraising in their forward plans and business plans. Specialist training has enabled staff, volunteers and trustees to develop skills, knowledge and, importantly, confidence, to develop and deliver successful fundraising initiatives and campaigns.

We hope you have been inspired to try out some of the fundraising initiatives that have been featured in this booklet. If you would like further information about fundraising, why not check out our library of fundraising learning resources? These free, downloadable resources include information and advice about diverse topics such as retail, trusts and foundations, venue hire, governance, fundraising strategies, friends groups, crowdfunding, and individual giving and legacies.

The library can be found on our website at:

www.sharemuseumseast.org.uk/shared-enterprise-resources/



