



# SHARED Enterprise Evaluation Report May 2018

**Author** Laura Crossley, Independent Project Evaluator | **Editor** Harriet Foster, Independent Project Evaluator



# Contents

<b>1.0 Introduction</b>	<b>01</b>
1.1 Project aims	02
1.2 Planned project outcomes	03
<b>2.0 Methodology</b>	<b>06</b>
2.1 Online survey	06
2.2 Training course and event participants: surveys	07
2.3 Cohort participants: focus groups and surveys	07
2.4 Participant interviews	08
2.5 Consultant feedback	09
2.6 Project team feedback	09
2.7 Most Significant Change workshop	10
<b>3.0 Project Outputs</b>	<b>11</b>
<b>4.0 Project Outcomes and Impacts</b>	<b>15</b>
4.1 Cohort groups	15
4.1.1 Developing a funding ready board, March – September 2014	16
4.1.2 Maximising income from commercial operations, September 2014 – Spring 2016	17
4.1.3 Fundraising strategy, September 2014 – June 2015 and April – December 2015	18
4.1.4 Individual giving and legacy fundraising, September 2016 – March 2017 and February – September 2017	20
4.1.5 Trusts and foundations, September 2016 – March 2017	23
4.1.6 HLF bids and major capital developments, September 2016 – March 2017	25
4.1.7 Fundraising strategies for small museums, February – September 2017	26
4.1.8 Feedback from interviewees	27
4.1.9 Reflections from Apollo Fundraising	30
4.1.10 Reflections from the project team	32

4.2	Innovator groups .....	33
4.3	Fundraising network .....	35
4.4	Training courses .....	35
4.4.1	Participant feedback .....	37
4.4.2	Trainer feedback .....	39
4.5	Events .....	40
4.5.1	Conference .....	40
4.5.2	Funding fairs .....	41
4.6	Learning resources .....	42
4.7	Small grants .....	45
4.7.1	Individual giving small grants .....	45
4.7.2	Relationship and legacy giving small grants .....	46
4.7.3	Governance small grants .....	47
4.7.4	Marketing small grants .....	47
4.7.5	Fundraising consultancy .....	48
4.7.6	Commercial Development Grants .....	49
4.7.7	National Arts Fundraising School bursaries .....	49
4.7.8	Impacts of small grants .....	51
4.8	‘Benchmarking’ visits to other organisations .....	52
4.9	E-newsletters .....	52
4.10	Information and advocacy tools .....	53
4.11	Online survey findings .....	53
4.11.1	Most and least useful aspects of the project .....	53
4.11.2	Motivations for participation .....	55
4.11.3	How organisations access funding .....	56
4.11.4	Most Significant Change workshop findings .....	60
<b>5.0</b>	<b>Difference the project has made for heritage, people and communities .....</b>	<b>61</b>
<b>6.0</b>	<b>Working with specialist partners .....</b>	<b>67</b>
<b>7.0</b>	<b>Project legacies .....</b>	<b>69</b>
<b>8.0</b>	<b>Lessons learnt .....</b>	<b>70</b>
<b>9.0</b>	<b>Findings and Recommendations .....</b>	<b>72</b>

The Executive Summary to this report, and a series of case studies from the project on income generation and fundraising, are available as free downloads: [sharemuseumseast.org.uk/shared-enterprise-resources](http://sharemuseumseast.org.uk/shared-enterprise-resources)

# 1.0 Introduction

An independent museums consultant, Laura Crossley, was commissioned in October 2015 to evaluate the SHARED Enterprise project. Laura evaluated the project between October 2015 and January 2018. The evaluation was continued by an independent evaluation consultant, Harriet Foster. This report has largely been written by Laura with some input from Harriet.

The SHARED Enterprise 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 2011/12 East of England annual benchmarking survey<sup>1</sup> found that a range of public funding sources were being accessed, including local authorities and national programmes funded through public monies, such as HLF or ACE. Many of the funding streams accounted for in the annual benchmarking survey form a museum's 'core' grant, and there was overall a reduction in income from core sources. Coupled with this, there was a reduction of around 50% in 'time-specific' project grants coming into the sector. Museums were accessing funding from Charitable

Trusts, and from private donations and business sponsorship, and funding from these sources appeared to be rising. However, funding from donations and charitable income was a relatively small proportion of the overall income into museums in the East of England, providing the second lowest income strand for museums across the region. The findings suggested that there was a need to diversify funding sources to prevent the threat of decreased services or closure. Encouragingly, the 2015/16 East of England benchmarking survey found that £6.4m was received in grant funding by the region's museums and £4.7m was received in contributed income.

The ongoing evaluation was used to shape the remainder of the SHARED Enterprise programme. This report will inform SHARE's future work.

## 1.1 Project aims

The broad aims of the project were to deliver a blend of training and development opportunities designed to enable museums of all sizes in the East of England to increase their capacity and bring additional funding in from private sources. It was intended that the project would facilitate dialogues between museums, businesses, trusts, charities and other private givers, providing opportunities to explore mutually beneficial projects; this was to include developing an understanding of Corporate Social Responsibility and the skills and resources that business can offer as non-financial contributions. Drawing on expertise within and outside of the museums profession, the project aimed to provide training and knowledge-gathering opportunities for museums, including seminars; conferences, cohort training programmes and a funding fair, which would promote sector-wide skills development. In addition, throughout the programme, learning was to be captured and resources developed, ensuring knowledge is shared across the sector regionally and nationally, and with other sectors where appropriate.

<sup>1</sup> Foster, Harriet, 2012. Report on the Survey Results from 'Benchmarking in the East of England' [sharemuseumseast.org.uk/shares/resource\\_242.pdf](https://sharemuseumseast.org.uk/shares/resource_242.pdf)011-12

## 1.2 Planned project outcomes

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.

The aims and outcomes of the project were to be achieved through:

- Cohort groups
- Innovator groups
- Fundraising network
- Workshops
- Funding fairs
- Conference
- Learning resources
- Consultancy and other specialist support

It was hoped that the project would have the following impacts on heritage, people and communities:

### Heritage:

- Museums across the region will be able to access support and engage in a programme of activities that will help them to benefit from funding sources and productive partnerships with the private sector. Museums that are successful in this way should be in a stronger financial position so that the future of the heritage they manage is secured for the long term.
- This project will support museums in the East of England to become more resilient and adaptable, exploring how their offer makes them attractive for investment, whether that be from new Friends Groups or private donors. The project will help museums to develop relationships with potential private investors and businesses, ultimately becoming embedded in their local business communities and developing stronger strategies for fundraising
- In these organisations, staff, volunteers and trustees will be equipped with new knowledge which they will share with the sector through seminars, mentoring and creating case studies of their experiences. Further specialist training will be provided through the SHARE Museums East ('SHARE') training calendar, which will be available to all museums in the region.

## People:

- This project will provide museum staff and volunteers across the region with a range of opportunities to develop new skills, knowledge and confidence, for example in creating a funding plan or strategy for their organisation. They will learn from and share their experience and successes with others and understand more clearly what they have to offer in return to private sources that have funded them.
- Museum staff and volunteers will have a clearer understanding of the fundraising opportunities afforded by their various activities, whether that is through developing, for example, sponsored exhibitions, or developing mutually beneficial relationships with local business. The project will also encourage museum staff and volunteers to think creatively about raising funds for their organisation and to consider how improving their retail, catering, events and ticketing offer could lead to an increase in income from new and existing sources.

## Communities:

- Museums that are better equipped to raise funding from diverse sources will be better able to withstand threats and to adapt to changing circumstances in order to keep on managing their heritage, whilst providing an excellent offer to their local communities. This greater resilience will come about through stronger governance and more local involvement in the museums which are both elements of the SHARED Enterprise programme.
- A more resilient and sustainable heritage sector will be able to offer increased opportunities for communities to become actively involved through volunteering and will also have positive economic benefits locally by attracting visitors to the area who are then likely to spend in other local businesses.
- Working in partnership with local businesses and organisations will also increase museums' capacity by sharing skills, resources and activities and offering mutually beneficial corporate volunteering opportunities on site.

The project was designed to benefit the following groups in particular:

- Paid staff and volunteers working in the museums sector across the East of England. They will benefit from participating in the range of capacity building and training activities in the programme, which will enable them to develop new skills, share learning and experiences with others and be equipped to make a positive contribution to the future sustainability of the organisation they work for. Four hundred and twenty-nine (429) people will be trained through this project and 25% of these will be volunteers. This is based on the average ratio of participants in previous SHARE activities.
- By making the future of the heritage held in museums in the East of England more secure and sustainable, local people and tourist visitors who enjoy visiting and engaging with the diverse heritage across the region will also benefit from the project.

# 2.0 Methodology

This section sets out the research methods that were utilised by Laura Crossley in the evaluation of the SHARED Enterprise project.

## 2.1 Online survey

The author of this report created an online survey that asked a broad range of questions to explore the impact of the project upon participants and their organisations and to gather their views on the project. The survey was sent directly to **15** people and was also advertised via the SHARED e-newsletter.

- Fifty people from **36** organisations participated in the survey; not all the respondents completed each question. The sample size represents just over 6% of all participants in the project (50 / 789) so caution must be taken when making any conclusions. The survey was useful in enabling us to take a broad look at participants' experiences of the project and project impacts and reach a larger number of people than we would have reached via interviews and focus groups. Data from the survey has been considered in conjunction with other data when drawing conclusions and making recommendations.
- Respondents were asked to state which element(s) of the SHARE Enterprise project they had taken part in. The majority of respondents had taken part in at least one cohort, **16** had attended a training session, **8** the fundraising forum, **7** the funding fair, **6** the conference, and **2** the business innovators group. Given this, data from the survey may relate more to the cohorts than other elements of the project.
- Thirty-three respondents were paid staff, **9** were trustees, and **7** were volunteers.
- Respondents' organisations were located across East Anglia (an additional organisation is based in Worcester): Norfolk (**14**), Cambridgeshire (**9**), Hertfordshire (**9**), Essex (**7**), Suffolk (**6**), Bedfordshire (**3**), and Peterborough Unitary Authority (**1**).

- The majority of respondents (**27**) work in independent organisations, **16** work in Local Authority museums, **2** in university museums, **2** in other charities, and **1** in a church-owned organisation. This mix is representative of the organisations that took part in the project, which tended to be small and medium-sized museums.
- Respondents were asked to describe their organisation: **40** work in museums, **2** in industrial heritage sites, **1** in an organisation that supports the historic environment, **1** in an historic house, **1** in a heritage building, **1** in a youth charity, **1** in a County Archive, **1** in a marketing/business consultancy, and **1** in a support organisation for museums.
- Respondents were asked which community, or communities, they serve. All the organisations serve their local communities, **19** serve national communities, and **9** serve international communities.
- Respondents were asked approximately how many visitors their organisation has each year: **19** said up to 9,999; **21** said 10,000 – 49,000; and **8** said more than 50,000.

## 2.2 Training course and event participants: surveys

Training course and event participants were asked to complete paper surveys that collected summative evaluation about their experiences and the impact that courses and events had on them.

## 2.3 Cohort participants: focus groups and surveys

Cohort participants were asked to complete surveys before and after participation in the cohort, and were asked for their feedback in small focus groups that took place during each final cohort session.

## 2.4 Participant interviews

Nine participants took part in semi-structured interviews that explored their views on the project, their motivations for participating in the project, and the impacts of the project on them and their organisations. Each interviewee participated in at least one cohort but they and their colleagues had often also attended training sessions and/or the business innovator group.

As well as feeding into the evaluation of the project, elements of the interviews were also turned into case studies that were featured in the advocacy and best practice booklet which are available online at [sharemuseumseast.org.uk/shared-enterprise-resources](https://sharemuseumseast.org.uk/shared-enterprise-resources)

Interviewees were:

- **Kate Axon**, Development Director, Museum of East Anglian Life, Suffolk
- **Mark Bills**, Director, Gainsborough's House, Suffolk
- **Valina Bowman-Burns**, Learning from History Manager, Essex Record Office (ERO), Essex
- **Pam Halls**, Curator, Cambridge Museum of Technology, Cambridgeshire
- **Elie Hughes**, Curator, Ely Museum
- **Mike Nevin**, Trustee, de Havilland Aircraft Museum, Hertfordshire
- **Anthony O'Connor**, Director, Epping Forest District Museum, Essex
- **David Oelman**, Chairman, The Fry Art Gallery, Essex
- **Nicola Sherhod**, Curator, John Bunyan Museum and Library, Bedfordshire

## 2.5 Consultant feedback

Independent consultants, as well as individuals from Shared Enterprise CIC and Apollo Fundraising, have provided summative feedback about various elements of the project:

- **Alex Lindley** and **Shirley Collier** provided written feedback about the Board Development Project.
- **Selina Fellows** provided a written evaluation of the Maximising Income from Commercial Operations cohort.
- **David Burgess** of Apollo Fundraising provided written feedback about cohort training and one-to-one mentoring.
- **Shirley Collier** and **Christina Lister** answered interview questions via email about their experiences of running one-day training sessions for the project.

In addition, **Shirley Collier** provided independent written feedback about the 'Developing your Friends Group' workshop that took place on 4 June 2015.

- **Shared Enterprise CIC**, which was commissioned by SHARED Enterprise to provide specialist support on fundraising to the Fundraising Strategy Development cohort, provided written summative feedback on this cohort, that included feedback from participants.

## 2.6 Project team feedback

Laura Crossley interviewed the SHARED Enterprise Project Officer, Miranda Rowlands, in November 2017. This semi-structured interview sought Miranda's views on each element of the project, enabling consideration and exploration of what worked well, what could have gone better, and lessons learnt about both the project itself and fundraising in the museum sector.

Following the interview with Miranda, Laura conducted an email interview with Joe Hoyle, SHARE Museums East Museum Development Assistant, who provided administrative support to the SHARED Enterprise project. The interview explored Joe's thoughts on the project, what went well, what could have gone better, and what skills he learnt as a result of working on the project.

## 2.7 Most Significant Change workshop

Sarah Plumb, a Gallery Educator and Academic Researcher, and Laura Crossley, delivered a Most Significant Change workshop at the Botanic Gardens in Cambridge on 26 April 2016. Most Significant Change (MSC) is a participatory form of monitoring and evaluating social change programmes and projects, which can also act as a form of advocacy. The technique is applicable in several different sectors and has been used by many different organisations all over the world. It is an inclusive approach as many stakeholders are involved both in deciding the sorts of change to be recorded and in analysing the data. It also focuses on qualitative outcomes and it does not make use of pre-defined indicators, especially ones that have to be counted and measured.

MSC is suited to monitoring that focuses on learning rather than just accountability. It is also an appropriate tool to find out the effect of the intervention on people's lives and keen to include the words of non-professionals. In addition, MSC can help staff to improve their capabilities in capturing and analysing the impact of their work.

Eleven people, representing nine organisations, participated in the MSC workshop. Participants represented independent museums and art galleries, and Local Authority Museums, and worked in various roles: directors, fundraising, project workers, and museum development. Findings are reported in Section 4.11.4.

## 3.0 Project Outputs

Intended project outputs have largely been met and, in some cases, greatly exceeded.

The business innovators cohort and fundraising network were delivered slightly differently to how they had been envisaged in the original project bid as it became clear that alternative approaches were more appropriate and effective.

PROJECT ACTIVITY	TARGET	DELIVERED
<p>5 cohort groups comprised of 6 museums and 12 participants. Cohort participants will feed back their knowledge to the sector with an input into resources and writing case studies.</p> <p>5 additional cohort groups were created as part of the project's extension.</p>	<p>60 participants from 30 museums across the region.</p>	<p>129 participants across 12 cohorts, taking part in 32 group training events and receiving one-to-one support.</p>
<p>2 innovator groups comprising 6 pairs (one museum lead and one business partner); total of 12 museums and 12 business partners over the course of two years.</p>	<p>12 museums and 12 business partners over 2 years.</p>	<p>Business Partnership Innovators: Feb 2015 – April 2016: 11 participants.</p>
<p>1 SHARE fundraising network with up to 20 participants which meets up to 4 times per year and provides at least 1 training event and a network report, documenting ideas and experiences. Ambition for the network to be a permanent project legacy.</p>	<p>Up to 20 participants from museums and heritage organisations, LEPs, Chambers of Commerce, business and regional bodies such as English Heritage.</p>	<p>Over 20 participants have been trained in fundraising and are ready to offer fundraising advice to museums in the region.</p>

PROJECT ACTIVITY	TARGET	DELIVERED
<p><b>9</b> courses through the SHARE training calendar; a minimum of <b>12</b> people at each course.</p> <p><b>16</b> additional training workshops will be delivered as part of the project's extension.</p>	<p><b>125</b> participants in total across <b>9</b> training courses.</p> <p>Total target: <b>25</b> courses across the whole project.</p>	<p><b>45</b> training courses completed, which were attended by a total of <b>736</b> people.</p> <p>An additional output: Whole organisation one-to-one coaching involving <b>3</b> sessions and <b>63</b> delegates.</p>
<p><b>1</b> funding fair for up to <b>100</b> people.</p>	<p>Up to <b>100</b> participants from across the region.</p>	<p><b>2</b> funding fairs were attended by <b>95</b> people.</p>
<p><b>1</b> additional funding fair as part of the project's extension.</p>	<p>Total: <b>2</b> funding fairs across the project.</p>	
<p><b>2</b> conferences for up to <b>100</b> people.</p>	<p>Up to <b>200</b> participants from across <b>2</b> regions (split over <b>2</b> half day conferences).</p>	<p>One full day conference was attended by <b>85</b> people.</p>
<p>Learning resources created with input from cohort participants. Resources will be available by the end of the project on the SHARE Museums East website.</p>		<p>Wide-ranging, diverse learning resources have been created and can be downloaded for free from the SHARE website. The resources have mainly been created by the Project Officer and fundraising consultants, with some input from project participants.</p>
<p>Job creation.</p>	<p><b>2</b> FTE jobs created to deliver the project.</p> <p>Consultants and freelancers employed to deliver different elements of the project (no numerical target set).</p>	<p><b>1.2</b> FTE jobs created.</p> <p>Salary under spend was used to fund additional events.</p> <p><b>24</b> consultants and freelancers employed.</p>

PROJECT ACTIVITY	TARGET	DELIVERED
1 consultant appointed to work with up to 5 museums to support the development of their existing board of trustees, attract new trustees, and encourage more effective working relationships between museum staff and trustees.	5 museums.	1 consultant appointed. 4 museums supported (5 initially but one dropped out) through 9 sessions involving 12 people.
1,038 instances of participation in training.	9 training courses with a minimum of 12 participants per course (108 people in total).	1,259 instances of participation in training from 289 different organisations.
Social media marketing and communications.		@SHARED_Ent has 626 followers on Twitter. The total number of impressions is 418,063. Over 40 months, this is an average of 10,452 impressions per month.
Volunteers.		212 volunteers have participated in the project, 113 of whom were trustees.
Cash contributions.	Norfolk Museums Service to contribute £11,000 of cash match funding to the project.	Norfolk Museums Service have given a cash match contribution of £17,435.
Non-cash contributions.		£10,514 of match funding contributions in the form of venue hire costs was donated by museums across the region during the project.  The Management Centre delivered half-price bespoke training, which was a prize won by Miranda Rowlands. This was an in-kind contribution of £1,500 to the project.

Participants in the project volunteered or worked at a range of museums, heritage organisations, and other organisations:

<b>TYPE OF ORGANISATIONS:</b>	<b>NO. OF ORGANISATIONS:</b>
<b>Museums</b>	
Independent – with paid staff	74
Independent – with no paid staff	26
Local authority	36
MDOs	4
University museums	6
	<b>Total of museums : 146</b>
<b>Heritage organisations</b>	
Friends of museums	15
Arts sector organisations	55
Funding bodies	9
Sector support organisation	6
	<b>Total of heritage organisations : 85</b>
<b>Non-museums</b>	
Local authorities (non-museum)	7
Businesses, consultants and LEPs	20
Universities (non-museum)	2
	<b>Total of non-museum organisations : 29</b>

# 4.0 Project Outcomes and Impacts

This section of the report considers each project outcome and how these have impacted on heritage, people and communities. In addition, the section reports on the findings of the online survey and Most Significant Change workshop, which are also considered when exploring the project impacts. Where possible, the Generic Learning Outcomes framework has been used to analyse and consider the impacts of the project<sup>2</sup>.

## 4.1 Cohort groups

The aim of the cohort groups was to teach fundraising theory to participants and help them 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 their learning to their organisation and situation, and to discuss fundraising opportunities and challenges that were most appropriate for them. It was hoped that cohort participants would offer their knowledge back to the sector through events, case studies and learning resources. During the course of the project, **178** people took part in the cohorts.



*Cohort meeting*

<sup>2</sup> Generic Learning Outcomes (GLOs) measure the learning benefits that people gain from interacting with arts and cultural organisations. The five GLOs are: Knowledge and understanding; skills; attitudes and values; enjoyment, inspiration, creativity; activity, behaviour and progression. [artscouncil.org.uk/measuring-outcomes/generic-learning-outcomes#section-1](https://www.artscouncil.org.uk/measuring-outcomes/generic-learning-outcomes#section-1)

## 4.1.1 Developing a funding ready board, March – September 2014

Participants learnt new knowledge and skills from attending the cohort that they have applied in practice at their organisation. For instance, they have:

- Set up a new committee
- Developed a strategy
- Used a skills audit to identify the right people for a new fundraising committee and help draw up a list of questions when interviewing potential trustees.

Participants felt that the cohort provided a safe space which stimulated open communication between staff and board members. They appreciated that the trainers were insightful, adaptive, responsive, professional, good at listening and at challenging and animating discussions.

The trainers noted that it is important to be prepared for the fact that each participating organisation has different needs and sessions and resources need to be tailored to meet those wide-ranging needs. They also offered some 'lessons learnt' for the future:

- Museums say they want things and sign up for training without fully understanding what is entailed. For example, only one out of the four museums in this project had a clearly articulated fundraising goal. We had assumed that this would be in place already.
- It is important to work hard on getting the vibe right at the start of the session; the museums don't know each other very well, some of them may be in competition for trustees or funds, and they will have pre-conceptions about each other.
- The balance between chivvying and allowing time for people to share their experiences is a delicate one. Time on the SHARED Enterprise training sessions is so limited that there is a tendency to think you need to push on, but what the participants want (and what makes them feel comfortable) is hearing from each other, even though this sometimes adds very little in terms of learning, and can actually be a major distraction!
- We were right to have a baseline for participation, without it we would have struggled even more to get people at the right stage of their museum's development.
- Be prepared for gaps in knowledge where you didn't expect it. Decide in the moment whether or not you can fill that gap or whether to re-jig the training.

## 4.1.2 Maximising income from commercial operations, September 2014 – Spring 2016

Selina Fellows, Retail and Marketing Consultant, delivered this cohort and wrote an evaluation report for SHARED Enterprise about the work. This section of the report has been written using Selina's evaluation report.

Five museums participated in this cohort, which were diverse in terms of governance model, collection type, visitor numbers, scale and scope of commercial operations, operational set-up, or know-how of the respective teams. Given this, Selina worked with each museum to develop bespoke individual Action Plans.

One museum used the grant to pay for improved lighting and signage for their shop, and invested in new stock, including jigsaw puzzles, stained glass roundels and items related to the civil war. The signage made visitors more aware of the shop and the jigsaws and roundels sold well. Through receiving advice from the consultant, the museum is also in a strong position to start building a trading history to compare future sales with.

One museum developed their venue hire business and created new marketing materials to promote this. Bookings for the rooms increased within three months of the new brochure being distributed and have built steadily.

One museum wanted to improve its overall commercial operations, including the shop, photographic reproductions, room hire provision, and proposed refreshment area. A review of shop merchandise and room hire prices were the top priorities. Shop sales increased nearly threefold during the course of the project. During this period, the museum also successfully applied for an Arts Council England Resilience Fund grant, which included support for future retail strategy and licensing work.

One museum improved the presentation and sales space via new shop fittings. However, the team were unable to implement most of the Action Plan due to changes in governance and management of the shop.

One museum undertook work that they hoped would impact on revenue and profits, including investing in equipment that would enable them to take card payments, redisplaying the shop area, separating out donations, merchandise and catering sales, and putting systems and processes in place which all the volunteers could use and become familiar with so there would be shared responsibility for some of the retail basics. All of these aims were achieved.

### 4.1.3 Fundraising strategy, September 2014 – June 2015 and April – December 2015

Participants have developed knowledge, skills and confidence as a result of attending the cohort:

- The cohort has been a catalyst for involving other staff in the work of the museum and creating a more cohesive approach.
- I have a much better overall understanding as regards a fundraising strategy.
- This is a new field for me so techniques, handout information, the opportunity to network with others was very important and useful.
- Better understanding of different sources and methods of fundraising (e.g. payroll giving, e-fundraising). ‘Thinking process’ and trustee consultation which went into developing fundraising strategy.
- Increased awareness of what other museums are doing. Information about fundraising methods and technical support.
- How to write a fundraising strategy.
- Getting to grips with funding applications. Initially I was terrified of writing applications. Now I feel a lot more confident.
- It was an excellent forum within which to develop a new strategy by listening to other participants’ experiences and ideas and to test ideas. I had not worked in a collaborative way on a strategy before.

Very few of the museums had a fundraising strategy prior to participation in the cohort and all have now developed a fundraising strategy. Participants reported that having a fundraising strategy had proved useful in many different ways:

- One funder we applied to asked to see our fundraising strategy as part of the application. We were able to give them this straight away.
- It has clarified our thinking – our capital funding bid is essential to everything else so has to be the priority.
- We have a strategy with achievable outcomes, tied in with our constitutional changes and changes of governance.
- It makes people accountable and helps to get buy-in from others.

Participants felt the main benefits of participating in the cohort were:

- improved knowledge of how to identify and access alternative funding streams;
- developing a practical fundraising strategy in order to successfully implement actions to raise funds effectively;

Participants felt that the cohort model was helpful in enabling them to have time away from their organisation to think and plan.

Most participants felt that the cohort had been a good forum for shared learning but some felt that this element could have worked more effectively. The most positive aspect of the shared learning approach was the opportunity to meet and network with other museum staff, trustees and volunteers. Participants particularly commented on the value of finding out that other museums experience similar problems and hearing about how others had dealt with these. Participants who felt that the shared learning aspect did not work as well as it could have done offered varying explanations for this, including:

- Shared learning may have worked better in other counties, but in our case the museums involved were too different in size and scale of their fundraising targets for there to be much value in sharing ideas and experiences.
- The shared learning may have worked better if there had been more consistent representation from the museums involved.

Participants made a range of suggestions for ways in which the cohort could have been improved, including:

- It could be nice to do something practical in the session, like writing a legacy leaflet.
- We would have liked to get a round-up of information from the other two cohorts earlier in the process, but it's good we're doing that now.
- Is there scope to use the cohorts to broker partnerships with organisations, for example for EU funding?
- Fewer but longer cohort sessions may have worked better, and may have been easier for some museums to commit time to.
- Sharing the session resources in advance would be helpful.
- Some presentations were too long. Shorter presentations from experts, but with more opportunity to hear from other museums would have been more useful.

Participants considered that the balance between workshops and one-to-one support worked well. But the cohort may have worked just as well with two rather than three workshops. Several museums struggled to find time to attend all the workshops and some participants felt that attention and commitment to the cohort was waning by the third workshop.

Peer learning and support seem to have worked best between museums which were operating at a similar scale and with similar resources for fundraising. Although participants found the diversity of museums within each cohort interesting, they may have gained more from sharing ideas and experiences with similar museums. Rather than organising by county, it may be more effective to organise cohorts by fundraising experience, resources, or scale of funding requirements.

The cohort workshops were seen as a useful forum for exchanging ideas and experiences. But their value may have been enhanced by more collaborative learning and development. Many participants would have liked more opportunities for practical, group work activities such as developing a joint funding application.

The range of training opportunities offered through the SHARED Enterprise learning programme for museums was very welcome. But there did appear to be some overlap in the content of different cohort programmes, for example between this Fundraising Strategy Development cohort and another one on Individual Giving, which some museums found confusing and others found time consuming to engage with both.

#### 4.1.4 Individual giving and legacy fundraising, September 2016 – March 2017 and February – September 2017

Both Individual giving and legacy fundraising cohorts were successful, with participants achieving their objectives, learning new knowledge and skills and having an enjoyable and enriching experience.

Participants wanted to achieve the following:

- I wanted to feel more comfortable with the process and asking for legacies.
- We hadn't approached individuals in a systematic way. We wanted to begin to do this and get it right from the outset.
- We haven't done any fundraising to date and wanted to have a bit more space to consider this. We also wanted to meet more people in Suffolk.
- We are doing a big capital project at the moment and wanted to find ways to tackle the funding gap.
- We've generated income from trusts and foundations; this is a new way of generating income.
- More confidence in fundraising.

The participants felt that they had achieved what they set out to achieve:

- We are now identifying donors and bringing the learning together so we can go out and make the 'ask'.
- The cohort was good. It's good to know that you're going to see the cohort again; this made the interaction more meaningful.
- Learning about legacies has been really useful. After our capital project is finished, we will continue with [raising money through legacies].
- It's achieved what I anticipated it would achieve. As a trustee, I've gained more understanding of how to 'step up and make the ask'. I feel better prepared to do that now.
- I had a bit of an understanding about individual giving; the cohort has confirmed this. I know what we need to do and I know what 'Plan B' might be if 'Plan A' failed.
- I haven't been able to implement the learning yet but the tools we've been given are useful.
- I learnt a lot more than I imagined I would, including a lot of things that I'd not thought about before.
- 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.

Participants of both cohorts felt the main benefits of participating in the cohort were:

- improved fundraising skills;
- improved understanding of fundraising;
- increased confidence to apply the learning; and
- improved advocacy skills.

Participants had shared learning with their colleagues to support organisational fundraising efforts.

As a result of participating in the cohort, participants are going to continue fundraising, demonstrating that the learning is being embedded:

- Ely Museum has raised a lot of money, which has showed us that fundraising isn't impossible! Participating in the cohort has boosted our confidence and our belief in ourselves. We have a 'we can do it!' attitude. We now have a system of how to tackle fundraising; a process to go through.

- Now that we have key fundraising objectives [thanks to David], we're going to set up a fundraising scheme.
- We have created a legacy leaflet and programme. I'm going to apply my learning to a new HLF project that's being developed.
- We are implementing our fundraising programme. Getting the trustees involved has been significant. We also now have a long list of trusts and foundations and a prospect list of major donors.
- We're currently fundraising for an ongoing project that's going to cost a lot. We plan to look into legacies and create a legacy pack.
- Our people have been given greater confidence in their ability to fundraise; the results of this are coming through.
- It's given us structure to the way we think.
- The cohort has helped us set a clear route map for the future. We know we can achieve small things quickly. We've already had 5 enquiries about how to leave us a legacy.
- We now have a plan for what we're going to do this year. We know that fundraising is going to be a major part of our work – this has been a seismic shift in our organisation. As an individual, I feel confident and prepared for this shift – I wouldn't have felt this way without the cohort.

Participants felt that the cohort model had been useful, enabling them to see what other organisations of different sizes and types are doing and share learning and experiences with the group within a supportive environment.

Participants felt that the one-to-one sessions had been particularly useful. They especially appreciated tailored support, the opportunity to go into topics in-depth, and the opportunity to gain expert knowledge for free.

## 4.1.5 Trusts and foundations, September 2016 – March 2017

Participants wanted to achieve the following from the cohort:

- A strategy for fundraising. We'd had ideas and talked about it, but we needed a strategy.
- I was starting from square one; I didn't know about fundraising.
- I wanted to improve my skills, develop a strategic approach, and build relationships with trusts and foundations.
- Consolidate my random knowledge and remind myself of best practice.
- Put together campaigns and a strategy.

All participants felt that they had achieved what they set out to achieve:

- Coming to the sessions has helped me understand how to build relationships with trusts and foundations and speak the funders' language.
- We now know what funders expect. Where else could you get that information?
- The cohort programme is making sure information about fundraising from trusts and foundations is sticking.
- We have two projects on the go that we've moved forward. Everyone thinks they know how to do fundraising but, actually, it's a science that I didn't know existed. We wouldn't have achieved what we have without the cohort.
- The cohort has been great in engaging and upskilling trustees to do fundraising. It's raised our awareness of trusts and foundations. It's been good to be able to ask questions of an expert who knows, for example, which fundraising platforms and databases to use.
- The organisation is taking a major step change in its approach to fundraising. The cohort has upskilled me and the Director and enabled us to take this forward.
- I feel like we're on the way to achieving our aims but I've learnt that it doesn't happen overnight.
- If you don't go through the planning process, the chances are you won't succeed. The cohort has shown us how to fundraise; it's been very powerful. We know what the rules are now.

- I know what I need to do and I want to get on and do it. I was very nervous and now I feel like I have a plan.
- I feel motivated to put in fundraising applications. I know what it is that we need to do. I'll use that knowledge going forward.

Participants felt the main benefits of participating in the cohort were:

- improved fundraising knowledge;
- increased confidence;
- improved fundraising skills.

Participants had shared learning with their colleagues, including museum trainees and managers, and the wider sector. One person said that one colleague, who works in a front of house role, has an interest in pursuing fundraising and it has been great to be able to share knowledge with them to support their development.

Participants felt that the cohort model was beneficial in giving them time to reflect and plan outside the office, enabling them to access knowledge from a fundraising expert, and giving them the opportunity to share ideas with colleagues in the region. On the latter point, participants said they particularly valued working with others as it was motivating – it helped them drive forward actions – and it brought people who are located in an isolated region together. They said they would value the continuation of this peer-to-peer network after the cohort ends.

One person who volunteers in a volunteer-run museum said that they felt slightly inadequate compared to the paid museum professionals in the cohort, and felt that grouping similar types of museums together in cohorts might be useful. Some participants also raised the difficulty of travelling fairly large distances to attend sessions, and the challenge of asking the same two people to attend each cohort meeting.

Participants felt that the one-to-one sessions were particularly helpful. They appreciated the opportunity to plan and develop ideas and actions, as well as the tailored nature of the support. They valued working with an external fundraising expert, particularly as this kind of external support is unaffordable for some museums. Participants also appreciated the fact that one-to-one sessions were held at their venues, which meant they did not have to travel or go off-site.

Participants raised the importance of needing organisational buy-in to support fundraising efforts and mentioned the difficulties of getting managers and trustees on board with fundraising efforts. They suggested SHARED Enterprise could provide fundraising training for managers and senior managers.

## 4.1.6 HLF bids and major capital developments, September 2016 – March 2017

Participants wanted to achieve the following from the cohort:

- We'd wanted to do an HLF project for about 10 years. I wanted the accountability that comes from being in a cohort that meets multiple times as, in the past, unexpected stuff has come up that has meant that a bid hasn't worked out.
- I wanted to overcome the fear factor more than anything else.
- It's a few years since we last did a large-scale HLF bid. I wanted to get focused and confidence and update my knowledge.

All participants felt that they had achieved what they set out to achieve:

- I know the direction I'm heading in. I can see the light at the end of the tunnel.
- I have a more realistic idea of what's involved and am better able to make the case for spending time doing the bid.
- The cohort has been a bit of a lightbulb moment.
- I'm more confident. We're in a strong position now [to write the bid].
- It's been a catalyst to think about the HLF bid in concrete terms. The cohort has made the bid more concrete and realistic.

Participants felt the main benefits of participating in the cohort were:

- improved understanding of how to develop and write HLF bids, which has enabled them to advocate to colleagues;
- improved understanding of what the HLF are looking for;
- improved fundraising skills;
- better networks; and
- increased confidence.

Participants had been able to persuade colleagues that bid-writing takes a long time and requires a big effort.

As a result of participating in the cohort, participants are going to:

- Put in an HLF bid in the summer. Beyond that, we'll be looking at 'what next?' – what should we fund next? There are lots of things we'd like to do; we're looking at which are the most practical.
- Find half a day to share all the things we've learnt with colleagues.
- Get on and write the bid. I'm now really focused on doing it.

Participants felt that the cohort model was very useful. They particularly valued meeting other people who are also trying to bid to the HLF and share ideas. They felt that the cohort model supports accountability and keeps people motivated and engaged. The meetings were a chance to be focused away from distractions and thinking about what needs to be done to put a bid together.

Participants felt that the one-to-one sessions motivated them to take action and focus their thinking. They felt that having external input from a critical friend provided moments of inspiration and made their plans more robust.

#### 4.1.7 Fundraising strategies for small museums, February – September 2017

Participants wanted to achieve the following from the cohort:

- We needed to learn how to write a fundraising strategy as we require a strategy as a result of an action given to us following our recent accreditation.
- Raise trustees' awareness of fundraising.
- Understand how to write fundraising strategies.
- Learn about fundraising strategies and find a way forward. I didn't know anything about fundraising strategies prior to participating in the cohort.

All participants felt that they had achieved what they set out to achieve:

- The cohort worked well in terms of timing; we are currently delivering an HLF resilience project. The cohort has helped the trustees come on board. The session content has worked really well.
- The HLF have accepted our application and we've received a grant. We hadn't applied before we came to the cohort.
- Whilst the biggest success of participating in the cohort has been the practical result, we also have the knowledge base now and can think about fundraising differently.

Participants felt the main benefits of participating in the cohort were:

- making connections with other cohort participants and sharing ideas and issues;
- making connections with similar organisations that are in a similar position to each other;
- going to different venues and finding out what's happening in other museums;
- time to learn more than is possible in a one-day course;
- improving knowledge of fundraising and developing fundraising skills; and
- writing a fundraising strategy that was checked by the cohort leader.

Participants felt that the cohort model was very useful. They particularly valued connecting with others who are in a similar situation to their own and being given time to learn about fundraising strategies in-depth which may not have been possible in a short course.

Participants felt that the one-to-one sessions were invaluable as they gave participants the opportunity to focus on specific, individual concerns and what mattered to them.

## 4.1.8 Feedback from interviewees

All the people that were interviewed had participated in at least one cohort. They were asked to give feedback on their experiences.

Interviewees were very positive about their experience of the cohorts:

- The cohort was motivating and the sessions helped turn ideas into action.
- Helped me focus on the job at hand; I've moved from 'thinking about' doing something to taking action.
- Getting trustees involved was helpful; they can be a big barrier to fundraising and don't always appreciate the time it takes to fundraise.
- The personalised, expert support was helpful.

- 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’.
- The accountability offered by the cohorts is helpful.
- The museum is more invested in fundraising now.
- The cohorts were very helpful at operational and strategic levels.

Some interviewees raised issues, namely that it can be difficult to attend each of the three cohort meetings, particularly when meetings are a distance away. There is an accessibility issue for those who find it difficult to leave the office (e.g. lone workers or those in a very small team), and those who cannot easily be away for a whole day (e.g. parents who have to pick up children from school).

It is clear that participants learnt new knowledge and learnt and developed skills, including:

- Crowdfunding
- Making the ‘ask’
- Cultivating relationships
- Using fundraising campaigns to raise the profile of an organisation
- Planning and running fundraising campaigns
- Communicating the right messages
- Building and maintaining relationships with businesses
- Writing a fundraising strategy
- Improved understanding of donations boxes
- Improved understanding of retail

All the interviewees have shared their new knowledge and skills with other members of their organisation.

All the interviewees have gone on to take action as a result of participating in the cohort(s), for example, putting into place crowdfunding campaigns, developing marketing literature, improving the retail offer, improving donations boxes, undertaking community fundraising campaigns, and launching an individual giving webpage.

Participation in the cohorts has been transformational for individuals and their organisations. The cohorts have supported people to learn new skills and knowledge that are starting to make their organisations more income-generating, and become more confident in fundraising. One person, who feels that their organisation has a better understanding of how to fundraise and is starting to draw in more money from wider sources said: “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”.

Participants talked of the benefits of trustees attending the cohort meetings; this has supported organisational transformation by improving trustees' understanding of fundraising and the amount of time required to fundraise effectively and supporting trustees to develop fundraising skills. Having trustees involved has also supported staff members to advocate for fundraising in their organisation.

Participants enjoyed and appreciated the networking opportunities afforded to them by the project. They talked of having made good contacts who they still feel they could talk to about fundraising, having a better understanding of what other museums in the region are doing in regards to fundraising, and meeting people who they might not otherwise have met. One person, the Chairman of a volunteer-run organisation, said:

“Networking opportunities have been the most useful thing for me. Within the cohort, I could be honest about problems and talk to people who are doing similar things.

Networking is very important for us as we are volunteers. I came from engineering; others came from PR, banking, hospitals. We don't have a museum background. We don't know the right questions to ask or where to go. Going to other participants' museums and talking to people really helps. People tell you what's worked for them and you can assess this and see what might work for you.”

All the interviewees talked about the positive benefits of working with an external fundraising expert. Benefits listed included:

- Helping organisations to ‘think outside the box’
- Tailored support and advice that organisations have been able to put into practice. It is clear that participants feel the cohorts have empowered them to take action.
- Experts offering practical solutions to problems
- Being given current research and statistical information that participants can use to advocate for fundraising in their organisations.
- Receiving this expert support for free; many people said that they could not have afforded to pay a consultant without the support of SHARED Enterprise.

All the interviewees felt that the SHARED Enterprise project should continue in some way after the funding comes to an end, even if it is not possible to continue every element of the project. They felt that the cohorts and one-to-one support has been the most useful element of the project for reasons described above, mainly receiving expert advice and being part of a supportive group of peers who share and learn together. They would all like to continue a relationship with their fellow cohort members in the long-term future. Offering small grants for practical projects was considered to be particularly helpful; this meant that participants could quickly put theory into practice and were able to create tangible outputs that they are using to support fundraising efforts. Participants also particularly appreciated the one-to-one advice they were offered from both the fundraising consultant and the project officer.

## 4.1.9 Reflections from Apollo Fundraising

David Burgess of Apollo Fundraising has delivered training for several cohorts. His reflections are as follows:

- There have been some changes in mindset and approach. The sustained engagement with museums over a period of six months (and, in some cases, beyond) means that some participating museums have started to implement changes to their fundraising.
- The one-to-one sessions supported organisations to plan and tailor their approach, while the group sessions provided the theory. The ability for organisations to focus on how the theory applies within their own context has been key to the success of the training.
- Organisations have reported an increased understanding of key principles and increased confidence in understanding the implications of the training for their organisation.
- While some participants have taken steps to implement the learning, we are aware that some museums have not yet put any of the learning into practice. For some organisations, this was always the plan. A number of other internal barriers may be preventing some participants from putting the theory into practice. In particular, we believe some organisations are struggling to balance fundraising as a priority with the resources available to them. Very few of the participating museums have dedicated fundraising staff. In most cases, the responsibility for fundraising sits with one person (either paid staff member, volunteer or trustee) and it is rare that fundraising is the sole priority. Implementing these changes takes work, often with delayed reward. With so many of these participants being over-stretched, the desire to progress with fundraising is trumped by the need to complete other day-to-day tasks. While museums say that increasing fundraising, or diversifying their income is important, in practice it seems to take a lesser priority. If museums genuinely want to advance in fundraising, boards and senior management teams need to ensure that time is being dedicated to fundraising. Linked to this, the desperate need for funds combined with a lack of resource can lead to organisations ignoring best practice in the hope of short-term wins. This includes mass-mailing appeal letters to cold prospects, poorly thought-out crowdfunding campaigns and organisations prioritising processes that are easy for the museum rather than easy or appropriate for the supporter. Generally, these approaches represent a false economy.

- Some museums used the cohort programme as a way of engaging board members with fundraising. In addition to volunteer-run museums (where the board are traditionally very hands-on) this has included organisations where board members are less involved in the day-to-day running of the museums. While we have not fully evaluated the effectiveness of this, or the implications for longer-term action, the discussions and conversations we have witnessed have suggested that there is great value in board members being involved in this programme. Conversely, we have also seen non-participating board members present a barrier to fundraising progress. For example, we have seen at least two organisations prevented from considering the implementation of a legacy programme due to the seemingly misguided beliefs of their trustees. In both cases, we have witnessed the programme attendee's frustration as they can see how this type of fundraising could work for their organisation. Successful fundraising requires involvement from the board, especially where the museum is looking to implement a step-change.
- While it is certainly not unique to the participating museums, the cohort training programme has once again highlighted the challenge faced by local authority museums when it comes to fundraising. Some of these challenges, such as the lack of charity status when it comes to applying to Trusts, or the lack of trust that funding will be used as the supporter intended, can be partially avoided by the establishment of a separate fundraising charity.

David offered recommendations for the future of SHARED Enterprise if funding allows:

Suggestions for the continuation of the cohort programme:

- The compulsory involvement of one trustee per participant in future cohorts.
- The implementation of a small fee or deposit for involvement in the cohort programme.
- Additional one-to-one session following the third group workshop.
- Group or partnership sessions following the completion of the cohort.
- Extension of the small grants programme.

Suggestions for other support SHARED Enterprise could provide:

- A hub for best practice e.g. sharing case studies of success from within the region and further afield, sharing details of opportunities – such as training, conferences and grants – that would benefit museums.
- A mentoring or buddy scheme.
- Engaging Local Authority staff with fundraising.

## 4.1.10 Reflections from the project team

The Project Officer felt that the cohort model worked really well. The duration of the cohorts supported learning and better enabled participants to form alliances – for example, Swaffham and Fakenham Museums set up their own reciprocal visits in addition to the project cohorts.

Two models were trialled during the project: the first were county-based cohorts which included museums from the same county; the second were commonality-based cohorts which included museums that were similar and were trying to achieve similar fundraising aims. The second type of cohort was felt to be the most useful as participants could see more shared attributes between themselves which facilitated learning.

The Project Assistant felt that the cohorts have been a particularly successful element of the project, that “museum staff have benefited exponentially from one-to-one tailored support that is unique to their institution. An appreciation of fundraising that takes into account museum-specific skills, audiences and time has been a big help to those sites. The bespoke offer has also instilled real confidence in some of the museums when planning and delivering fundraising campaigns.”

On a personal level, the SHARE Museum Development Assistant has gained knowledge of the differing types of fundraising available – having no real knowledge before. Joe particularly learnt from the sessions delivered by consultant David Burgess, covering behavioural economics and preparing campaigns for individual giving. Joe now has the confidence to discuss and at least help plan fundraising campaigns. He now has an appreciation for the intricacies of fundraising and has a new found appreciation of the subject. Joe also has more confidence in his ability to write funding applications and can now speak with some degree of confidence about an understanding of fundraising.

## 4.2 Innovator groups

This cohort explored mutually beneficial ways of working in partnership with businesses. It was hoped that participants would offer their knowledge back to the sector, an aim which has been achieved.

An initial workshop was attended by 22 delegates from 17 museums, who learned from case studies about a range of business partnership models. Evaluation of the session demonstrated that participants enjoyed the training, were inspired, and felt motivated to look for partnerships:

- Extremely helpful. Trainers successfully engaged us all which led to a sharing and producing of ideas.
- Very good. Creating the context for a very useful discussion. Actions will follow, an excellent catalyst.
- Very useful – came with no ideas – open to suggestion and came away with a potentially good business partnership plan.
- Lots of relevant discussion and case studies.
- More like this! Innovative ways of surviving and thriving in the current climate!

Of those 22 delegates, 10 (from 8 museums) have attended a further three meetings and been supported individually to develop business plans. In April 2016, delegates presented a training workshop to share learning and case studies.

Following the initial workshop, the following projects were developed. Participants met for a further three meetings and received one-to-one support from the consultants. Museums learned about the benefits of working with business partners and were supported to develop business plans and approach potential partners, with varying degrees of success.

- Gainsborough's House: Business partnership developing with neighbouring Vanners Silk Mill, who are giving the museum in-kind support and advice.
- Much Hadham Forge Museum: Attempted to develop a joint ticketing offer with the Henry Moore Foundation. They agreed in principle, but the plan did not come to fruition due to logistical challenges. Staff are also investigating the feasibility of licensing the images of the Museum's Tudor wall paintings, including weighing up how much would be reasonable to charge for media use and considering ways of publicising the images.

- Epping Forest District Museum: Beginning to develop a relationship with a local printer to reproduce images from the collection of Walter Spradberry prints. Staff are also investigating the possibility of working in partnership with the London Transport Museum.
- Museum of East Anglian Life: The Museum has started to offer weddings on-site. Staff considered organising the weddings in-house versus using a wedding planner. An external wedding planner has been engaged as this represented the lowest risk model.
- Ancient House Museum of Thetford Life (Norfolk Museums Service): The Museum has developed a partnership with Simon Long Removals and Storage. The company offered emergency storage solutions in return for specialist advice about environmental controls.
- Norfolk Museums Service: Investigated the feasibility of developing products based on the collections for sale in the museum shop, working in partnership with Norwich University of the Arts and local craftspeople.

Evaluation found that the business innovator groups was the hardest element of the project to accomplish and the least successful element of the project. The cohort did not happen in the way that had been planned as it proved very difficult to recruit business partners; participating museums did not have existing business partners to bring to the cohort and it was hard to get businesses to attend on their own.

Due to the difficulties outlined, this element of the project changed a little; two workshops were delivered for museums about business partnerships to help participants think about how they could work with businesses and support them to plan how to approach businesses. Eleven out of **26** participants went on to develop those plans with support from The Museum Consultancy. Participants were at very different stages of thinking about business partnerships so not all went on to develop strong partnerships. However, there were some great success stories, including the Museum of East Anglian Life which started a wedding offer, and Gainsborough's House which developed a very fruitful relationship with a local silk mill, as detailed above.

The Project Officer reflected that, if this element of the project was to be delivered again, a different approach should be taken from the start. It would be useful, for example, to present case studies from museums across the UK to inspire participants and then provide one-to-one support for people who are ready to run with an idea.

## 4.3 Fundraising network

The original aim of the fundraising network was to create a self-managing forum to support the development of good practice, sharing fundraising skills and experience. The end-product is slightly different to the network that was envisaged in the original project application; the idea was reworked after consulting with people who wanted to participate in a fundraising network and finding that they all wanted very different things from the network. Given these multiple aims and ambitions, a decision was made to bring together the top museum fundraisers in the region and work towards these people becoming a go-to advice service for others who wish to get advice about fundraising after SHARED Enterprise comes to an end. The future advisors were given high-level fundraising training by the Management Centre to support them to take on this advisory role.

## 4.4 Training courses

During the course of the project, there were **736** instances of participation in **45** training courses. Twelve of the courses were part of the original SHARED Enterprise programme; **9** were 'extras' delivered by Miranda Rowlands at no charge except travel expenses; **27** were additional to the original programme, due to the extended deadline and additional funding.



Course titles and number of delegates are listed below:

TRAINING COURSE	NO. OF DELEGATES
Trusts and Foundations	6
Introduction to Museum Fundraising for Trainees	9
Increasing Individual Giving	10
Crowdfunding: the latest fashion in fundraising?	13
Building Business Partnerships – introductory session	11
Building Business Partnerships – introductory session	13
Fundraising Forum: Initial Meeting	19
Not Another Leaflet! Marketing and Promotion	16
BAfM Area Conference	22
Developing Friends Groups	18
Introduction to Museum Fundraising for Trainees	11
Relationship Fundraising and Legacy Giving for Museums	25
Norfolk Arts Forum Crowdfunding Workshop	23
MP workshop at MA Conference: Crowdfunding	50
Norfolk Arts Forum Conference	99
Awareness, Engagement and Impact: Marketing to Drive Fundraising and Income Generation	20
BAfM Area Meeting	20
Becoming more entrepreneurial through partnership working with local businesses	14
Most Significant Change – evaluation workshop	11
Working Together: Great People Great Teams	10
My Museum Matters: Making Your Case	9
Introduction to Museum Fundraising for Trainees	9
Trustees: The Golden Rules	11
Introduction to Digital Fundraising and Legacy Giving	9
Fundraising Forum: Fundraising Strategy and Case for Support	14
Friends Indeed	9
My Museum Matters: Making Your Case	9

TRAINING COURSE	NO. OF DELEGATES
Fundraising Forum: Trusts and Foundations	16
Trustee Muster: Succession Planning	16
Working Together: Great People Great Teams	16
Awareness, Engagement and Impact: Marketing to Drive Fundraising and Income Generation	9
Trustee Muster: Succession Planning	9
Fundraising Forum: Individual Giving and Legacies	8
Introduction to Museum Fundraising for Trainees	9
Fundraising Forum: Corporate Support	14
Trustee Muster 3/4	19
Writing Effective Funding Bids – part 1	17
Data Savvy Fundraising: what you need to know about the GDPR	14
Writing Effective Funding Bids – part 2	14
Trustee Muster 4/4	13
Marketing and promoting venue hire	19
Marketing and promoting venue hire	9
Data Savvy Fundraising: what you need to know about the GDPR	16
Logging on to Digital Fundraising	12
Logging on to Digital Fundraising	16

#### 4.4.1 Participant feedback

The SHARED Enterprise team evaluated each individual training session via an evaluation form that was given to participants at the end the session. Participants have learnt new knowledge and it is clear that they enjoyed, and were inspired by, the sessions.

Comments included:

### Knowledge and understanding, and skills

- I knew very little before the training and now I feel like I have the knowledge and skills to start.
- Expanded knowledge and gave lots of new ideas.
- Excellent help on how to proceed with our fundraising activities.
- Very thorough advice and facts on legacy giving and how to approach this area of fundraising.
- [The training] sparked ideas for me to think about how I can phrase what we do in a more saleable way.

### Enjoyment, inspiration, creativity

- Very interesting and informative. Loads of information and advice. Excellent training day.
- Fantastic, trainer was excellent.
- Very helpful and inspiring – plenty of food for thought and creative suggestions.
- Excellent, engaging and knowledgeable speakers.
- I had no idea what to expect and was delighted to be exposed to such detailed help.
- I enjoyed the session and found it very useful, particularly the participatory aspect.
- Really interesting and useful. Definitely pitched at the right level.
- Good session and thought-provoking – had a few “light bulb” moments.
- Good mix of subject matter but greatest benefit is opportunity for health check on our museum and Friends relationship and ability to develop it thereafter.
- Really useful to start considering issues from Friends point of view and identify ways in which we could move the relationship to being more collaborative.
- Very clear, even for someone very unfamiliar with fundraising. Engaging, informative, brilliant all round! Provides excellent foundation in fundraising, and definitely de-mystifies and makes it a bit less scary!
- Great, informative training session. Well-structured and engaging.
- A useful chance to think through ideas and be inspired.

## 4.4.2 Trainer feedback

Two trainers, Shirley Collier and Christina Lister, gave their feedback on the training sessions. Shirley delivered workshops about governance, fundraising, team-building and working with Friends groups. Christina delivered workshops about marketing to drive fundraising and income generation.

Both trainers felt that the venues provided for training were conducive to learning and comfortable. However, they acknowledged that the location of venues can be an issue in such a large region that lacks infrastructure, and where some organisations are very rurally isolated. One trainer suggested that SHARED Enterprise could perhaps run online webinars to help people attend sessions. One trainer said that it is important to hold sessions in venues that are perceived as being interesting as this motivates participants to attend.

Participants were receptive to learning, contributing ideas and questions, and sharing examples and experiences. They valued being able to speak to and learn from each other too. The trainers felt that there was a real value in enabling volunteers and paid staff from different organisations to come together to learn and share. The training helps empower people by making them believe that they are more capable than they realised, and that others are in the same situation.

One trainer said that the funded training element of SHARED Enterprise is critical in supporting all of the organisations in the region who have the passion and interest to start, or develop, fundraising, but not necessarily the time, budget or specialist skills. They also felt that providing the training for free makes it much more accessible.

One trainer said that although the courses stimulate thinking and raise awareness, participants do not necessarily implement their learning in the workplace. This highlights the difference in impact between the one-day training sessions and the cohorts; the latter better enable participants to learn and implement practice, whereas the former perhaps spark inspiration but this does not necessarily always translate into action.

## 4.5 Events

### 4.5.1 Conference

A joint conference with Hampshire Cultural Trust, which shared learning from both Catalyst projects, was held on 2 March 2016 at the Museum of London. The conference, entitled Enterprise and Philanthropy: Building Relationships to Fund Museums, attracted 95 delegates.

Conference attendees were particularly keen to learn from case studies (**43** of **54** responses), learn about fundraising/philanthropy (**42**) and network (**38**). Evaluation collected from participants demonstrated that the conference enabled participants to:

- Learn from case studies;
- Learn about fundraising / philanthropy;
- Learn how to build relationships from a donors' perspective;
- Obtain specific fundraising advice;
- Meet with funders; and
- Network with others

To a slightly lesser extent, the conference also supported participants to learn about commercial enterprise / business partnerships.

Participants were asked what they had learnt at the conference that would make a difference to their work. Responses clearly demonstrated 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; and
- The importance of relationship development and management in encouraging legacy giving.

## 4.5.2 Funding fairs

Two funding fairs have taken place – one in May 2016 in Bury St Edmunds and another in April 2017 at the Museum of East Anglian Life. The fairs were attended by a total of **95** people. This provided the opportunity for delegates to find out more about fundraising opportunities within the sector and learn from examples of good practice within the region.

The format of the fairs was inspired by the fair delivered by Museum Development North West. The events included talks, presentations and 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. Participants could have informal conversations with those from the trade stands. At the second fair, participants could also attend one-to-one fundraising clinics with the Heritage Lottery Fund and Apollo Fundraising.

Feedback from delegates – who came from a diverse range of museums – shows that they learnt new knowledge. For example:

- Learnt quite a lot about online fundraising.
- The smaller funding bodies' schemes (up to £10,000) that can be applied for... this will allow me to advise and work with community groups.
- How people donate.
- Finding out about funding streams... and understanding what they do and how they affect my role / the museum.
- How HLF funding applications work.
- That I need to present my organisation in a unique way that stands out.
- That education is still a key goal for ACE.
- Information about funding applications, how to make them as effective as possible and information available to help you.
- That some funders are very happy to talk pre-application and to give advice about applications. I will be braver in contacting them!

## 4.6 Learning resources

A comprehensive bank of learning resources and case studies has been created and is online on the SHARE website: [sharemuseumseast.org.uk/shared-enterprise-resources/](https://sharemuseumseast.org.uk/shared-enterprise-resources/).

The resources are wide-ranging, addressing diverse topics including information about funding organisations, behavioural economics, case for support, weddings, and a governance health check. Below is a list of resources, which was correct at the time of going to print.

The majority of resources have been created by the Project Officer and fundraising consultants. A small number of organisations that participated in cohorts or other elements of the project have shared their learning via case studies (see Section 2.4).

### Videos:

- SHARED Enterprise conference: [sharemuseumseast.org.uk/videos/](https://sharemuseumseast.org.uk/videos/)
- Animation: Museum retail for small shops (developed in partnership with SHARE Museums East and AfCE): [www.youtube.com/watch?v=v-XKND7ttkU&feature=youtu.be](https://www.youtube.com/watch?v=v-XKND7ttkU&feature=youtu.be)
- SHARE Museums East/ SHARED Enterprise **YouTube Channel** – general video about SHARED Enterprise.

### Resources for funding – links to key funding organisations and other funders:

- Arts Council England funding
- National Museum Directors' Council – Museums Matter
- British Association of Friends of Museums
- Culture Hive – A free resource to help you discover and share best practice in cultural marketing, including lots of free fundraising resources, Arts Marketing Association: Future Proof Museums Notebook
- Signpost2Grants
- Signposting to Tessitura Network's YouTube channel for talks on harnessing data to drive customer loyalty, and therefore increase income and donations
- Fundraisers Using Data – Tessitura Network
- What Tessitura Can Do For Your Museum
- Fundraising Forum Resources

## Resources produced to accompany workshops, the conference and funding fair, cohorts and training courses:

- Fundraising Forum: Strategy Handout (developed by The Management Centre)
- Two articles from the Management Centre and David Burgess about Behavioural Economics and how to apply this to boost online donations
  - Behavioural economics: why we think much less than we think we think... and why it's important
  - 10 ways to increase donations through your website
- SHARED Enterprise Funding Fair, 9 May 2016 (presentation slides from the event)
  - Introduction to HLF, May 2016
  - Art Happens
  - Case for Support workshop – David Burgess, the Management Centre
- Presentation slides from the Inspiring a Culture of Philanthropy and SHARED Enterprise HLF Catalyst Umbrella conference on 2 March 2016 at the Museum of London
  - Peter Maple's keynote presentation – UK Philanthropy
  - Museum of East Anglian Life – Whole Organisation Approaches to Fundraising
  - Norfolk Museums Service – Weddings at Norwich Museums
  - Jaane Rowehl – Income Diversification
  - Anne Young's keynote presentation – Supporting resilience and building on the learning from Catalyst
- Governing Body Development Project (developed by Shirley Collier)
  - Cultivation Strategy for a Museum Redevelopment Programme
  - Governance Health Check
  - Fundraising Committee Terms of Reference Template
  - Board Skills Audit Template
  - Example Chair Role Description
  - Example Secretary Role Description
  - Example Treasurer Role Description
  - Example Trustee Role Description

- SHARED Enterprise Fundraising Strategy cohort 2015 (produced by Shared Enterprise CIC, Colin Gilfillan)
  - Fundraising Matrix
  - Fundraising Strategy Template for museums
  - A Guide to Grant Funding Sources for Heritage Organisations
- Developing Your Friends Group, 4 June 2015 (developed by Shirley Collier)
  - PDF Version of Powerpoint from Developing Your Friends Group session
- Crowdfunding: The Latest Fashion In Fundraising?, 12 December 2014 (developed by Miranda Rowlands)
  - PDF Version of Powerpoint from Crowdfunding: The Latest Fashion in Fundraising?
- Increasing Individual Giving, 27 November 2014: (developed by Shirley Collier)
  - Increasing Individual Giving: 1. Introduction to Philanthropy
  - Increasing Individual Giving: 2. Golden Rules and Different Methods
  - Increasing Individual Giving: 3. Writing a Fundraising Plan
  - Increasing Individual Giving: 4. Legacies and Planned Giving
  - Increasing Individual Giving: 5. Online Giving
- Trusts and Foundations, 20 October 2014 (developed by Miranda Rowlands, Jamie Everitt and Steph Potts)
  - PDF Version of Powerpoint from Trusts and Foundations session
- Giving to Heritage Fundraising Webinars (developed by The Heritage Alliance, 2015, for another Catalyst project)
  - Trusts, Foundations and High Net Worth Individuals
  - Knowing Your Worth: Partnering with Bigger Institutions
  - Calling All Angels: The Case for Support at St Nicholas Chapel
  - Developing a Legacy Strategy
  - Effective Leadership
  - A Mixed Fundraising Model
  - Making the Most of Digital for Heritage Fundraising
  - Successful Event Fundraising
  - Fundraising in the Community
  - Structuring Your Organisation for Fundraising

## 4.7 Small grants

The following tables set out the organisations that received small grants and information about their projects. A total of **39** small grants were awarded to **31** organisations.

### 4.7.1 Individual giving small grants

<b>ORGANISATION AND COUNTY</b>	<b>PROJECT</b>	<b>AMOUNT</b>
<b>Ely Museum, Cambridgeshire</b>	Employment of a self-employed fundraising consultant to advise and assist with the development of a fundraising strategy for individual giving towards match-funding the museum's HLF-funded redevelopment.	<b>£500</b>
<b>Essex Police Museum, Essex</b>	Improvements to the museum's donations box.	<b>£150</b>
<b>Flag Fen Archaeology Park, Peterborough</b>	Individual giving campaign targeted at Flag Fen's traditional adult and academic audiences.	<b>£500</b>
<b>John Bunyan Museum and Library, Bedfordshire</b>	New donations box (match-funded via a grant from the museum's Friends Group).	<b>£500</b>
<b>Warner Textile Archive, Essex</b>	Specialist advice about, and training in, Gift Aid to enable the archive to set up Gift Aid and to develop marketing to encourage visitors to Gift Aid donations.	<b>£500</b>
<b>Museum of Cambridge, Cambridgeshire</b>	Two new donations boxes.	<b>£500</b>
<b>Essex Record Office, Essex</b>	Donations boxes for internal and external events.	<b>£96.26</b>

## 4.7.2 Relationship and legacy giving small grants

ORGANISATION AND COUNTY	PROJECT	AMOUNT
<b>de Havilland Aircraft Museum, Hertfordshire</b>	Production of a legacy leaflet and display material to encourage visitors to give legacies. Changes to the museum's e-commerce website to communicate the benefits of legacy donations and provide legacy information.	<b>£1,500</b>
<b>Ely Museum, Cambridgeshire</b>	Production of a leaflet that highlights ways to donate through lifetime giving, including legacies, and a cultivation event.	<b>£1,421.60</b>
<b>Epping Forest District and Lowewood Museums, Essex</b>	Development and launch of a membership scheme, production of individual giving flyers, and a membership/cultivation event.	<b>£1,500</b>
<b>Museum of Zoology, Cambridgeshire</b>	Information and application leaflets for Friends and Director's Circle, and a legacy offer and cultivation event.	<b>£1,500</b>
<b>Long Shop Museum, Suffolk</b>	Various small individual giving projects: <ul style="list-style-type: none"> <li>• Research and select suitable donation-enabling platform</li> <li>• Copy for website about donations</li> <li>• Web page about donations</li> <li>• Banner to promote and advertise individual giving</li> <li>• Brochure giving case for support with a 'how to donate' leaflet/card</li> </ul>	<b>£1,440</b>

A further grant of **£1,490** was awarded to a museum in Norfolk but, due to extenuating circumstances, staff were not able to deliver the project and the grant was repaid.

### 4.7.3 Governance small grants

<b>ORGANISATION AND COUNTY</b>	<b>PROJECT</b>	<b>AMOUNT</b>
<b>Swaffham Museum, Norfolk</b>	Skills audit / role description.	<b>£1,280</b>
<b>Bawdsey Radar Museum, Suffolk</b>	Facilitated away day.	<b>£2,010</b>
<b>Ely Museum, Cambridgeshire</b>	Staff development follow-on.	<b>£1,050</b>
<b>Museum of the Broads, Norfolk</b>	Skills audit and recruitment.	<b>£2,500</b>
<b>Epping Forest District Museum, Essex</b>	Away day for new Development Trust.	<b>£1,626</b>
<b>Museums Norfolk, Norfolk</b>	Evaluation and succession planning.	<b>£2,500</b>

### 4.7.4 Marketing small grants

<b>ORGANISATION AND COUNTY</b>	<b>PROJECT</b>	<b>AMOUNT</b>
<b>National Heritage Centre for Horseracing, Cambridgeshire</b>	Venue hire brochure.	<b>£1,401.85</b>
<b>Braintree Museum, Essex</b>	Branding and venue hire improvements.	<b>£2,000</b>
<b>Farmland Museum and Denny Abbey, Cambridgeshire</b>	Venue hire marketing and improvements.	<b>£1,320</b>
<b>Girlguiding Norfolk ARC, Norfolk</b>	Venue hire brochure.	<b>£1,000</b>
<b>Fitzwilliam Museum, Cambridgeshire</b>	Venue hire pack and AV equipment.	<b>£2,500</b>

<b>ORGANISATION AND COUNTY</b>	<b>PROJECT</b>	<b>AMOUNT</b>
<b>Epping Forest District and Lowewood Museums, Essex</b>	Downloadable venue hire pack.	<b>£ 750</b>
<b>Sheringham Museum, Norfolk</b>	Venue hire brochure and equipment.	<b>£2,500</b>
<b>British Schools Museum</b>	Escape Room Game setup.	<b>£458.50</b>
<b>Norfolk Museums Service</b>	Marketing material for corporate appeal and Ambassadors scheme linked to Norwich Castle Keep Project.	<b>£2,500</b>

#### 4.7.5 Fundraising consultancy

<b>ORGANISATION AND COUNTY</b>	<b>PROJECT</b>	<b>AMOUNT</b>
<b>de Havilland Aircraft Museum, Hertfordshire</b>	Securing match funding.	<b>£2,500</b>
<b>Essex Record Office, Essex</b>	Training and strategy.	<b>£2,385</b>
<b>Ely Museum, Cambridgeshire</b>	Securing match funding.	<b>£2,400</b>
<b>Museum of East Anglian Life, Suffolk</b>	Farming Matters.	<b>£2,400</b>
<b>Museum 4 Watton, Norfolk</b>	Work plan and fundraising strategy.	<b>£2,000</b>
<b>St Seraphim's, Norfolk</b>	Sustainability plan.	<b>£2,400</b>
<b>St Seraphim's, Norfolk</b>	Developing a fundraising strategy.	<b>£2,500</b>
<b>Wisbech and Fenland Museum, Cambridgeshire</b>	Fundraising campaign planning and future resilience.	<b>£1,850</b>

## 4.7.6 Commercial Development Grants

ORGANISATION AND COUNTY	PROJECT	AMOUNT
100th Bomb Group Memorial	Varian Centre shop reappraisal.	£563.61
John Bunyan Museum	Improving the shop visually, and with new lines of merchandise.	£800
Lowewood Museum	Lowewood Museum commercial operations development.	£800
Peterborough Museum	Venue hire brochure.	£800

## 4.7.7 National Arts Fundraising School bursaries

One staff member each from Norfolk Museums Service, Essex Record Office, Colchester and Ipswich Museums Service, and the Museum of East Anglian Life were given bursaries of **£2,350** each in order to attend the National Arts Fundraising School (NAFS).

Evaluation found that attendance at the School enabled bursary recipients to acquire new knowledge and skills:

- I discovered compelling reasons for going into legacy fundraising and considered good practice from other arts organisations in this area.
- Specific advice for Local Authority fundraisers – including tailored advice, contacts and timescales for setting up a CIO.
- Communication skills – a very unexpected bonus!
- Individual giving.
- How to develop a good problem for applications to trusts and foundations.
- The expected growth in legacy giving and the potential for our fundraising to be developed in this area.
- Stewardship.
- What works, what doesn't, how to make it better.
- Structuring an application to a trust or foundation.

- How to apply to corporate organisations for funding. I gained an understanding of the potential and limitations.
- Communication skills – this was the best part of the course for me. 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.
- Individual giving, bequests and legacies – I learned that this is the area with most growth and the one where SHARE can make a real difference.

Evaluation also found that the bursary recipients have been inspired to use their learning in the future:

- I will incorporate new learning into the Fundraising Strategy, being created with support from a SHARED Enterprise consultancy grant.
- I am making an application for a specific education project, 'The Football Project' based on what I have learnt during the Trusts and Foundations sessions.
- I'll create a plan for legacy giving and share what I have learnt with my team.
- I'm practising what I learnt in the communication skills sessions to make my presentations more professional.
- Review our fundraising strategy and sharing the learning with colleagues through some training scheduled for the spring, specifically focused on fundraising through trusts and foundations.
- Use learning to help create a 'support us' page on our website to enable online donations.
- I have already submitted an application for funding following the course and made a small but successful ask to a donor.
- I will review and improve our online giving.
- I will apply the 'what works etc' to what I do to continue to improve.
- I will be making a number of applications to trusts and foundations over the coming months and will apply my learning to this.
- I have set myself a target of a small amount of corporate sponsorship in 2018 – 2022 despite the limitations of this funding source. I will be applying mainly to trusts and foundations, and although I already have a lot of experience in this area, I learned a lot and am better placed to make applications, particularly to the private trusts in which I have less experience.

- I will be revising our [museum development] training programmes for 2018 – 2022 to put more emphasis on developing museums in the area of individual and legacy giving as this is where all museums could potentially do much better in building up their skills and funding reserves.
- I will also be able to offer some advice on fundraising to museums, but I am also better placed to assess the experience, expertise and value of external consultants to deliver training in this area for us.

### Recipients also commented on the impacts that attendance at NAFS has had on their organisation:

- Essex Record Office owes a debt to SHARED Enterprise... Each [element of the scheme we participated in] has benefited us when we have needed it most and allowed us to engage in a way that fits with our other commitments.
- [Attending the School] has given us an expert, insider's view of fundraising streams we can diversify into and the intensive, week-long residential has allowed us to do this at speed. Thanks to this learning, our present has more opportunities and optimism. Our future, previously a vision of continuing cuts and loss, now has a direction more certain and secure.
- Increase the chances of success for fundraising applications to trusts and foundations.
- I expect to raise more funding for the museum and improve the supporter experience.
- I will be able to advise other museums on fundraising issues with much more authority and confidence than previously. My experience was really limited to trusts and foundations; I now have an understanding of the wider picture and the advantages and disadvantages of applying to the various different funding sources.
- We have to raise additional funding for our own programmes in the next four years. The training and advice I received from the programme will be invaluable in helping me find new funding sources and to apply to them with more confidence.

## 4.7.8 Impacts of small grants

All the small grants programmes have been evaluated individually and in-depth by independent consultants, Selina Fellows (focusing on the Commercial Development Grants), Harriet Foster and Laura Crossley. Their findings are summarised through a series of case studies and a report which have been provided separately to the Heritage Lottery Fund. In summary, the evaluation showed that recipients of small grants learnt new fundraising skills and gained confidence in fundraising.

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 indicated that grant recipients had learnt a great deal from delivering their projects and had undertaken helpful reflection on what worked well and what could have been done differently.

The grant recipients were each able to create something physical that has put their organisation in a better place for fundraising and income generation, including legacy leaflets, donations boxes, cultivation events, and marketing materials. These are important project legacies that SHARED Enterprise has supported.

The Project Officer feels that the small grants element of the project went well; offering potential grants to those who have undertaken training means that participants are firstly able to try out bid writing skills and, if successful in getting a grant, are also immediately able to put learning from training into action. Offering small grants to training participants is a powerful way of helping people put learning into practice and supporting small-scale projects to take place; this approach should be continued in the future by SHARE if possible.

## 4.8 ‘Benchmarking’ visits to other organisations

The SHARED Enterprise Project Officer has made many visits to other organisations. In addition, she has attended, and spoken at, conferences and workshops in partnership with Norfolk Arts Forum (a conference and a crowdfunding workshop), British Association for Friends of Museums (a conference and an area meeting), the Museums Association, the Art Fund, and the Institute of Fundraising Trust’s Fundraising conference.

## 4.9 E-newsletters

Regular e-newsletters, which give up-to-date information about the SHARED Enterprise project and encourage e-newsletter recipients to get involved in the project, have been sent to museum staff and volunteers throughout the East of England for the duration of the project.

## 4.10 Information and advocacy tools

The project aimed to share learning widely across the museum sector. This has happened via word of mouth (e.g. project participants sharing learning with colleagues), events and conferences, the learning resources, and specific information and advocacy tools – a short film, advocacy booklet and an executive summary of the project evaluation.

The short film, which features compelling and informational interviews with a selection of project participants has been produced. The film was launched at the joint SHARED Enterprise/Hampshire Cultural Trust conference in March 2016 and has been tweeted via the SHARED Enterprise Twitter account.

The advocacy booklet, which includes case studies illustrating good fundraising and income generation practice and provides top tips for people who wish to fundraise and become more commercially-minded, has been published and 500 copies distributed at the SHARE conference, via Museum Development Officers, and via direct mail. The booklet is also on the SHARE website and can be downloaded for free as a PDF.

Aside from a final, in-depth evaluation report, the Evaluation Consultants have also produced an Executive Summary of the report that has been professionally designed and distributed (500 copies). This is also available as a free-to-download PDF on the SHARE website.

## 4.11 Online survey findings

The following section outlines findings from the online survey, to which **50** people from **36** organisations responded.

### 4.11.1 Most and least useful aspects of the project

Respondents were asked what they feel has been the most useful aspect of the project for them. The four main benefits are listed below, with illustrative quotes:

## Networking; meeting, and learning from, other people

- Meeting other organisations and learning from their experiences.
- It has been great to meet people and learn more about their organisations and objectives.
- Sharing with other participants. This and the support [from experts] made us not give up and keep persevering with our project.
- Hearing from different sized organisations and learning about the ways that differently resourcing levels can achieve great results.
- Learning from what other much smaller and more innovative organisations are doing.
- Meeting colleagues and hearing others' experiences.
- Networking with peer organisations.
- Networking, learning and sharing ideas.
- Networking; to hear of others' experiences, successes and failures.

## Learning new information – some of which has led to tangible outputs

- Advice on attracting funding for a specific project.
- Funding and governance information.
- Raising awareness and providing new ideas. Opened up new possibilities.
- Being made aware of the best ways of fundraising and maximising donations from visitors.
- The advice and support given.
- Understanding who are the major potential donors in the UK, which has helped optimise our fundraising resources.
- Identifying the right size projects for the right level of donor. It has given me confidence to develop a donor strategy and clarified how projects can be segmented for fundraising purposes.
- Financial planning. We need to do this for our Accreditation and Forward Plan.
- Gaining greater knowledge of how to apply for funding and having the time to think about it.
- There is a current lack of understanding in my museum about what fundraising is and how to do it effectively. This project has given information that can be shared to try and clarify the message for people.
- Insight into how Trusts and Foundations work.
- Trusts and Foundations as this is a prime target for the Museum donation strategy.

## Working with external fundraising experts

- One-to-ones with David Burgess – getting tailored advice.
- Being able to work with Shirley Collier and receive mentoring on how to make the case for individual funding. Working with an experienced museum professional gave me the confidence to do something which I'd never done before (kick starting an individual giving campaign).

## Producing tangible outputs

- Outcomes of producing a fundraising strategy and a legacy leaflet.
- New donations box.

Respondents were asked what they felt has been the least useful aspect of the project for them. Only 12 respondents gave answers to this question; 14 people responded to say that all the project had been useful! The main issue that was raised (by 10 people) was that the advice given in sessions sometimes felt too general and not specific to the needs of an individual organisation. This cannot be helped in training sessions, when the trainer has to deliver a session that is suitable for a wide range of participants, and is difficult to deliver in group cohort sessions for a similar reason. One person said that they felt that the cohorts are time-consuming and one person said that they felt the professional fundraising consultants were too corporate.

## 4.11.2 Motivations for participation

### Respondents primarily participated in the project to:

- Gain confidence in fundraising.
- Gain specific skills and knowledge e.g. legacy fundraising, attracting corporate funding, how to write good funding applications, fundraising strategies.
- To increase income for their organisation.

Respondents felt they had achieved all, or some, of these aims. Illustrative quotes are set out below. The main benefit seems to have been learning new skills and knowledge. It is unsurprising that some have not generated extra income yet as this process takes time.

## Gain confidence

- I definitely feel much more confident in starting a future fundraising campaign.
- I feel confident now that I am going to be able to give the proposed bid my best shot.
- It gave me confidence in the approach I had begun to take; I found solutions and new ideas.

## Gain specific skills and knowledge

- We feel we have a better understanding of the work required and will put it to practice in due course.
- 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.
- The course explained and demonstrated correct approaches and reasoning behind successfully increasing fundraising.
- We're a lot clearer on what we are trying to do now. We have a plan for fundraising.
- I have been able to write and plan a strategy that we have since carried forward. There is now an understanding of the importance of fundraising for the museum and that money does not just appear! 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.

## Increase income

- We achieved more donations for the Roundhouse appeal, which had given us match funding for a future grant.
- The Museum has achieved donations/grants from HLF, individuals and legacies.

### 4.11.3 How organisations access funding

Respondents were asked how they accessed funding both prior to participating in SHARED Enterprise and following participation in the project. The table below shows the results.

Prior to participating in SHARED Enterprise, respondents mainly accessed funding for their organisations via time-specific grants (**25** respondents), one-off private donations (**21**), Local Authority (**19**), retail offer (**17**), regular private donations e.g. membership schemes (**14**), and fundraising via a Friends Group (**13**).

Following participation in the project, these fundraising methods were still key, but there was a small increase in the number of respondents who accessed money via business sponsorship, and a more noticeable increase for the café and legacies.

TYPE OF FUNDING	PRIOR TO PROJECT	POST-PARTICIPATION
Local Authority	19	16
Arts Council England RFO	8	10
Time-specific grants from e.g. HLF, ACE, local funders	25	26
One-off private donations	21	24
Regular private donations e.g. membership schemes	14	17
Business sponsorship	7	10
Retail offer	17	18
Café	8	13
Legacies	8	15
Fundraising via Friends Group	13	13

We asked respondents to consider what impacts, if any, the project has had on them and their organisations. It is clear that the project has had wide-ranging impacts that will benefit organisations now and in the future.

As a result of participating in the project, the following can be observed for respondents' organisations:

- **21** have developed fundraising strategies;
- **21** have stronger fundraising strategies than they had before;
- **26** have embedded fundraising into their Forward Plan;
- **9** have made new partnerships with a business or businesses;
- **12** have stronger governance;
- **13** are supported by an increased number of local people;
- **15** places in which organisations are located have generated income;
- **7** now offer corporate volunteering; and
- **9** have created a Friends Group.

As a result of participating in the project, the following can be observed for respondents:

- **24** better understand what their organisation can offer to private donors;
- **23** better understand what their organisation can offer to businesses;
- **28** better understand funding sources they can access;
- **11** better understand how improving their organisation's retail offer could lead to an increase in income;
- **3** better understand how improving their organisation's catering offer could lead to an increase in income;
- **3** better understand how improving their organisation's ticketing offer could lead to an increase in income;
- **13** better understand how improving their organisation's events offer could lead to an increase in income; and
- **26** have shared what they have learnt on the project with colleagues

Respondents were asked to rate, on a scale of 1-5 (where 1 is low and 5 is high), the extent to which the project has had specific impacts on them. It is clear that each of the following impacts has been achieved by the project:

- The average score for 'the project has inspired me' was **3.70**;
- The average score for 'I have enjoyed participating in the project' was **3.77**;
- The average score for 'participating in the project has changed my opinions about fundraising' was **3.10**; and
- The average score for 'I was encouraged to be creative and innovative' was **3.43**.

As a result of participating in the project, 18 respondents have already made changes to their practice and 11 intend to make changes in the future. Changes include:

- Building additional funding sources into restoration projects.
- Taking a more proactive approach as a team to fundraising, revising our governance (a newly appointed trustee will lead on strategy and governance).
- Adapted our fundraising strategy, particularly our corporate approach.
- Re-worded grant applications.
- Re-worded text on donations boxes.
- We are less of a push over and have learnt to push harder when dealing with commercial organisations.

- We are trying new approaches to fundraising and introducing an individual giving strand.
- 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.
- I have participated in a working group to review ticketing and membership options.
- Writing a fundraising strategy and keeping it updated
- I am more thorough in making sure that I build a case for support using team consensus rather than my own.
- Developed a legacy leaflet.
- Establishing a development trust and mapping out priorities in fundraising campaigns.
- Developing fundraising strategy and planning bids.
- We approached local businesses in a new way.
- I've written a strategy and have a fundraising group who meet regularly.
- Stronger engagement with volunteers, introduction of processes and incentives to promote fundraising.
- Fundraising approach has changed.
- Training has helped me in fundraising ventures outside my paid employment, including putting together a successful Awards for All funding bid for my local community. Previously, I wouldn't have thought of raising the funds for our community project in this way.

## 4.11.4 Most Significant Change workshop findings

The Most Significant Change workshop (Section 2.7) helped to explore the impacts that participants felt that the project had on them. They said that major changes that had occurred as a result of participating in SHARED Enterprise. The three themes that came out of the workshop were 1) increased confidence and refreshed attitude to fundraising; 2) development of knowledge and skills; and, to a lesser extent, 3) better infrastructure. Each theme has been listed along with a small selection of relevant quotes from participants:

### Attitude and confidence

- Presentation skills and confidence. No previous experience of fundraising so exchanging information of success and failure with others was instructive. This has also had an effect on my perception of our organisation.
- I am more confident in my fundraising ability and my knowledge and therefore have been able to offer better support and advice to not just museums, but other organisations as well. Specifically, I am working with 2 other organisations at the moment on various grant applications – my SHARED Enterprise experience has contributed to this.
- That I can stand up in public and make a short presentation.
- Attitude change to what fundraising is, how we assess it and how it is integral and long term.

These quotes demonstrate that the project has increased participants' confidence in fundraising and areas that are not specific to fundraising (public presentations), and that the project has reached wider than the museum sector.

### Knowledge and skills

- Knowledge of capital funders / bodies and tips for how to approach them. It has really helped in a more general understanding of how applications work, what funders look for, and how museums can think strategically and creatively.
- Meeting up with fellow museum people, which: sparked ideas; shared ways of tackling ideas and achieving successful outcomes; shared stumbling blocks and brick walls and helped find solutions to break them down.

These quotes demonstrate that the project has enabled participants to learn a variety of new skills and knowledge. The final quote suggests that giving space to people to share information about ideas can help bring about positive impacts.

## Infrastructure

- Fundraising beyond the usual suspects is a core activity, even for a Local Authority Museum.

At the end of the workshop, participants were asked, “From among all these significant changes, what do you think was the most significant change of all?”. Participants decided that the project had best helped to change people’s attitude and confidence (to fundraising, amongst other things e.g. public speaking), and felt the following quote best summed up this change:

“Attitude change to what fundraising is, how we assess it and how it is integral and long-term.”

# 5.0 Difference the project has made for heritage, people and communities

**Evaluation has demonstrated that the project has made significant differences for heritage, people and communities. These impacts are set out below**

For heritage:

1. Through increased knowledge and understanding of fundraising, increased skills, increased confidence, and the development of tangible and long-term outputs such as fundraising strategies, the project appears to have supported the future of the heritage held in museums in the East of England to be 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. A number of 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 museums that have participated in the project 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 is the most effective way to bring about these changes, through intensive, tailored expert support within a supportive peer network. Training sessions have effectively helped people learn knowledge and skills, but it is difficult to say whether they have led to action.
4. Working with professional fundraising organisations has led to museums developing stronger strategies for fundraising, and ensuring that fundraising becomes embedded in organisations' forward and business plans. Again, cohort participants were more likely to benefit from this than participants of individual training sessions.
5. Staff, volunteers and trustees are equipped with new knowledge and some have shared knowledge back into sector through events and 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 will be on the SHARE website as a permanent project legacy.

#### For people:

6. Paid staff, volunteers and trustees have developed new skills, knowledge and confidence, and have learnt from and shared their experience and successes with others.
7. Paid staff, volunteers and trustees 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.
8. Paid staff, volunteers and trustees are more skilled in asking for money from private sources, and understand more clearly what they have to offer back to these sources.
9. Paid staff, volunteers and trustees 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.
10. Paid staff, volunteers and trustees have been encouraged to think creatively about raising funds and better understand how improving their retail and events and, to a lesser extent, catering and ticketing offer could lead to an increase in income from new and existing sources.

- 11.** The development of fundraising strategies and 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.
- 12.** The evidence suggests that several participating organisations now have stronger governance and that trustees have a better understanding of fundraising. The survey suggests that the project has led to a slight increase in organisations offering corporate volunteering opportunities and being supported by an increased number of local volunteers. These factors may lead to greater resilience.

#### For communities:

- 13.** The survey (Section 4.11) suggests that some locations have experienced positive economic benefits locally through attracting visitors to the area. In addition, **212** volunteers (including **113** trustees) have participated in the project.
- 14.** The organisations that worked in partnership with local businesses and organisations benefited from sharing skills and knowledge with their business partners.

The table below contains a full list of the impacts it was hoped the project would have on heritage, people and communities and shows the evidence that was collected in order to find out whether, and the extent to which, each impact has been met.

## DEMONSTRATED THROUGH

### Impact

The future of the heritage held in museums in the East of England will be more secure and sustainable.

Training courses and event surveys  
 Online survey  
 Cohort feedback  
 Participant interviews  
 Case studies in advocacy booklet  
 Most Significant Change workshop

### Heritage

Museums across the region will be able to access support and engage in a programme of activities that will help them to benefit from funding sources and productive partnerships with the private sector. Museums that are successful in this way should be in a stronger financial position so that the future of the heritage they manage is secured for the long term.

Training courses and event surveys  
 Online survey  
 Cohort feedback  
 Participant interviews  
 Case studies in advocacy booklet

This project will support museums in the East of England to become more resilient and adaptable, exploring how their offer makes them attractive for investment, whether that be from new Friends Groups or private donors. The project will help museums to develop relationships with potential private investors and businesses, ultimately becoming embedded in their local business communities and developing stronger strategies for fundraising.

Online survey  
 Cohort feedback  
 Participant interviews  
 Case studies in advocacy booklet

In these organisations, staff, volunteers and trustees will be equipped with new knowledge which they will share with the sector through seminars, mentoring and creating case studies of their experiences. Further specialist training will be provided through the SHARE Museums East training calendar, which will be available to all museums in the region.

Training courses and event surveys  
 Online survey  
 Cohort feedback  
 Participant interviews  
 Case studies in advocacy booklet  
 Most Significant Change workshop

## DEMONSTRATED THROUGH

### People

<p>This project will provide museum staff and volunteers across the region with a range of opportunities to develop new skills, knowledge and confidence, for example in creating a funding plan or strategy for their organisation. They will learn from and share their experience and successes with others and understand more clearly what they have to offer in return to private sources that have funded them.</p>	<p>Training courses and event surveys</p> <p>Online survey</p> <p>Cohort feedback</p> <p>Participant interviews</p> <p>Case studies in advocacy booklet</p> <p>Most Significant Change workshop</p>
<p>Museum staff and volunteers will have a clearer understanding of the fundraising opportunities afforded by their various activities, whether that is through developing, for example, sponsored exhibitions, or developing mutually beneficial relationships with local business. The project will also encourage museum staff and volunteers to think creatively about raising funds for their organisation and to consider how improving their retail, catering, events and ticketing offer could lead to an increase in income from new and existing sources.</p>	<p>Training courses and event surveys</p> <p>Online survey</p> <p>Cohort feedback</p> <p>Participant interviews</p> <p>Case studies in advocacy booklet</p>

### Communities

<p>Museums that are better equipped to raise funding from diverse sources will be better able to withstand threats and to adapt to changing circumstances in order to keep on managing their heritage, whilst providing an excellent offer to their local communities. This greater resilience will come about through stronger governance and more local involvement in the museums which are both elements of the SHARED Enterprise programme.</p>	<p>Training courses and event surveys</p> <p>Online survey</p> <p>Cohort feedback</p> <p>Participant interviews</p> <p>Case studies in advocacy booklet</p> <p>Most Significant Change workshop</p>
--	---

**DEMONSTRATED THROUGH**

**Communities**

<p>A more resilient and sustainable heritage sector will be able to offer increased opportunities for communities to become actively involved through volunteering and will also have positive economic benefits locally by attracting visitors to the area who are then likely to spend in other local businesses.</p>	<p>Cohort feedback Participant interviews Case studies in advocacy booklet</p>
<p>Working in partnership with local businesses and organisations will also increase museums' capacity by sharing skills, resources and activities and offering mutually beneficial corporate volunteering opportunities on site.</p>	<p>Participant interviews Case studies in advocacy booklet</p>

# 6.0 Working with specialist partners

The project aimed to enable organisations to work with specialist consultants and partners, who could provide specialist, and, at times, tailored, fundraising advice. In total, 24 external consultants were engaged during the project:

- **Joy Allen**  
Leading Governance
- **Adrian Babbidge**  
Egeria
- **Nina Brown**  
Nina Brown Design
- **David Burgess**  
Apollo Fundraising and The Management Centre
- **Shirley Collier**  
Shirley Collier Coaching and Organisational Development
- **Laura Crossley**  
Museums and Cultural Consultant
- **Maurice Davies**  
The Museum Consultancy
- **Selina Fellows**  
Retail and Marketing Consultancy
- **Daniel Fieldhouse**  
Polygon Video
- **Harriet Foster**  
Consultation, Evaluation and Research in Arts and Heritage fields
- **Colin Gilfillan**  
Shared Enterprise CIC
- **Caitlin Griffiths**  
The Museum Consultancy
- **Anita Hollinshead**  
(Stage 1 project development)  
– Museum Consultant
- **Natasha Hutcheson**  
Cultural Heritage Consultant
- **Ruth Lesirge**  
Governance, Leadership and Management Development
- **Alex Lindley**  
Alchemy Consulting
- **Christina Lister**  
Christina Lister Comms
- **Ryan Litterick**  
Polygon Video
- **Paul Macro**  
Paul Macro Photography
- **Sarah Plumb**  
Museum Consultant
- **Nick Stone**  
Starfish
- **Caroline Vermeulen**  
Mystery Hare
- **Helen Wilkinson**  
The Museum Consultancy
- **Michael Woodward**  
Associate of The Museum Consultancy

The project aimed to work in collaboration with the New Anglia LEP to understand the economic impact of the cultural sector. In addition, it was hoped that the LEP would bring business partners to the table for the Innovators projects. This element of the project did not happen as planned. The Project Officer had initial conversations with New Anglia LEP, who were keen to broker partnerships, but this did not happen. However, Iain Dunnett of New Anglia LEP gave a presentation for the Norfolk business innovators cohort and at a Fundraising Forum meeting and a representative of Greater Cambridge Greater Peterborough LEP gave a presentation for the Cambridgeshire business innovators cohort and presented at the 2016 Funding Fair.

Extended training and one-to-one consultancy was offered to small groups of museums to help develop commercial operations (**5** museums) and to improve their governing bodies' fundraising capacity (**4** museums). In 2016, two museums engaged with fundraising coaching to staff at all levels of the organisation.

Specialist fundraising consultants were recruited to support the facilitation of the fundraising strategy cohort projects. Many cohort participants and interviewees mentioned the value gained by working with specialist consultants and appreciated being given the opportunity to work with a consultant, in a tailored way, for free.

SHARED Enterprise also worked in partnership with AIM to bring training for trustees, commissioned through the Hallmarks programme, to the East of England. Four sessions were hosted in the regions, attended by **66** delegates.

The Project Officer, who has a background in fundraising, has also been central to the success of the project. Interviewees praised her knowledge and ability to share skills, knowledge and ideas that have helped them move forward with fundraising. They particularly appreciated having someone they could call and ask questions of; one person said that they felt SHARE should continue to deliver a fundraising helpline one day a month to support organisations with fundraising and signpost them to helpful information.

An interview with the Project Officer revealed the following issues that can come with recruiting specialist fundraising consultants to work with museums:

- It was challenging to find specialist consultants who even knew the museum sector or could quickly appreciate the museum sector. Consultants must also understand that not all museums are large nationals and need to speak in accessible language so that all participants can understand the training.
- In order to find the right consultants, it was important that the success criteria in the brief helped the Project Officer assess applicants on how well they knew the museum sector; successful applicants needed to have worked in the sector or express an understanding of museums.

# 7.0 Project legacies

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

- Individuals have learnt knowledge and skills, and have more positive attitudes towards fundraising, including increased confidence, that will support their organisations (and their future organisations, if applicable) to continue to be income-generating and resilient in the future.
- Learning resources have been developed and can be downloaded for free on the SHARE Museums website.
- An advocacy film has been produced.
- An advocacy and fundraising best practice booklet has been produced and distributed.

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 SHARE 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.

- Business partnerships have been built, some of which – for example, Gainsborough's House/ Vanners Silk Mill partnership – look like they will continue in the future.
- 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.
- Organisations have created, or are in the process of creating, long-term fundraising strategies. In addition, de Havilland Aircraft Museum, which took part in several strands of the SHARED Enterprise Project, was awarded a £1.9 million HLF grant in April 2018 for its '21st century project'.

- The SHARED Enterprise Project Officer is writing a book, which will hopefully be published in the future.
- If SHARE cannot find external funding to continue the project, it will ensure that some elements of the project continue, such as fundraising and income generation training sessions.

## 8.0 Lessons learnt

The following lessons learnt have been identified by the project team.

### Lessons learnt for SHARE / SHARED Enterprise

- Having SHARE already in place made a big difference to the project as this organisation has an excellent reputation, which supported buy-in from museums.
- The project has demonstrated that there is a real need for museum staff and volunteers to develop fundraising skills, which are often lacking within the museum workforce. There is a danger that some of the learning from this project will disappear when the project ends, particularly with the loss of the Project Officer, an already experienced fundraiser who developed her fundraising skills even further during the course of the project. The Project Officer has undertaken a great deal of fundraising CPD during the project and has disseminated this learning to organisations across the region and beyond. Although SHARE will continue to support museums to develop fundraising skills, they will not be able to deliver the same level of provision that SHARED Enterprise has delivered.

### Lessons learnt about fundraising in the museum sector

The project has identified pockets of good practice within a variety of the region's museums. However, in general, capacity for fundraising in the region's museums was found to be lower than initially expected. Project activities and evaluation of these have revealed the following challenges:

- Significant numbers of museum trustees don't understand their responsibility as fundraisers, are reluctant to lead, get involved with or support fundraising activities.
- Feedback from engaging with the private consultants: it takes time to develop skills and to embed these skills within organisations. It also takes time for boards to change and develop. Being able to articulate need and having the right skills to be able to take discussions forward and to cultivate contacts is essential – can be more effective to invest in this than giving funding for the 'end game' of asking for private sector support.
- Feedback from engaging with the private sector consultants: it is not easy to articulate a fundraising goal and need and create a case for support. It takes time to develop relationships with the private sector; 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.
- Physical capacity is 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.
- Many people are reluctant to ask for money or believe fundraising is not their responsibility.
- Under-charging for services like curator talks and venue hire is quite common, and a missed opportunity for income generation.
- General understanding of different methods of fundraising is lower than anticipated.
- We know from delegate feedback that the training is well received and much appreciated. Delegates have increased fundraising knowledge and in particular have gained confidence from the training they have received. We also know that there is still demand for more training in the region.

# 9.0 Findings and Recommendations

The main findings of the evaluation are set out below along with potential implications / considerations for the future.

EVALUATION FINDINGS	POTENTIAL IMPLICATIONS / THINGS TO CONSIDER
<b>Project targets:</b>	
<p>Original project targets have been met and exceeded.</p>	<p>This project has achieved a great deal, surpassing many of the original targets. The project team should be congratulated for delivering such a successful project.</p>
<b>Cohorts:</b>	
<p>The cohorts were widely viewed as being an especially successful element of the project that enabled learning and skills development, peer-to-peer learning, and gave participants the skills and confidence to take forward their own fundraising and income generation initiatives.</p> <p>The cohorts have enabled people to learn skills and develop knowledge that is supporting organisations to embed fundraising practices and become more resilient. Participation has increased people's confidence, which is supporting their fundraising efforts. Cohort participants have created tangible outputs, including fundraising strategies, legacy leaflets and other marketing materials, donations boxes, and membership databases.</p>	<p>SHARE could continue the cohort structure if future funding and capacity allows. Cohorts seem to work particularly well in supporting participants to learn and develop fundraising knowledge and skills. Although cohorts are more resource-heavy than one-day training sessions, the evaluation suggests this model of learning has powerful impacts on participants and better enables them to take forward their own fundraising and income generation projects.</p> <p>If cohorts continue, consider ways in which to decrease the barriers that were identified e.g. meet in locations that are accessible, ensure timings of cohorts work for those with caring responsibilities as much as possible, provide support after the cohort to help participants put learning into practice – small grants can help with this (also see point below).</p>

## EVALUATION FINDINGS

## POTENTIAL IMPLICATIONS / THINGS TO CONSIDER

### Cohorts:

Participants have benefited from receiving current facts and figures regarding fundraising that they have been able to use to advocate for fundraising to colleagues and trustees.

Involving trustees in cohorts has been helpful; this has enabled trustees to better understand the process of fundraising and the time required to fundraise effectively.

Knowledge learnt in the cohorts has been disseminated to colleagues and, in some cases, the wider museum sector.

Tailored support with a fundraising expert is key to the success of the cohort model, as is the opportunity for people to be part of a supportive peer network that learns and shares together and motivates each other to take action. Participants also appreciated the opportunity to think, reflect and plan outside the office.

Small grants enabled cohort participants to quickly put theory into practice and create tangible outputs that they are using to support fundraising efforts.

Participants would appreciate the opportunity to stay in contact with fellow cohort members in a formal way e.g. through meetings.

For some however, cohort meetings can be difficult to attend, particularly for those who find it more difficult to leave the office, those with caring responsibilities and those in rurally isolated areas.

Seek to find ways in which to enable cohort members to continue to meet, preferably face-to-face. For example, an annual cohort meeting and sharing day could be incorporated into the SHARE training calendar.

SHARE could deliver more fundraising training that is directly aimed at trustees to help trustees understand the importance of fundraising and how they can fundraise for their organisations.

Small grants are a powerful way to help participants test things out and create tangible outputs. Consider continuing to offer small grants for fundraising and income generation projects.

## EVALUATION FINDINGS

## POTENTIAL IMPLICATIONS / THINGS TO CONSIDER

### Cohorts:

Some organisations have struggled to put learning into practice, mainly because of a lack of personnel who have time to fundraise.

Cohorts work best if they involve similar organisations who are interested in working on a specific area of fundraising, such as grant writing.

### Innovator groups:

Participants learnt about the benefits of working with business partners and were supported to develop business plans and approach potential partners, with varying degrees of success.

Participants have disseminated their knowledge to colleagues.

It was difficult to encourage business partners to participate in the group and, given this, the cohort worked differently than had been envisaged on the original project bid.

Continue to look for ways to advocate to businesses about the benefits of partnering with museums. SHARE could perhaps create case studies of successful museum/business partnerships that have come out of the SHARED Enterprise project.

Continue to support museums to understand how best to work with businesses; this seems to be an area that is less understood than other aspects of fundraising. In addition, SHARE (and the wider museum sector e.g. MDOs, Museums Association, AIM) could advocate to businesses about the benefits of partnering with museums.

### Training courses:

One-day training courses have enabled participants to learn skills and knowledge relating to fundraising. The training has very effectively enabled large numbers of people – **736** in total at present – to access free, professional training, something that may not have been possible for many of the organisations that have participated.

Continue to run one-day fundraising sessions for those who cannot commit to longer programmes. In addition, encourage participants to contact the newly trained fundraising advisors for advice and support following the training.

Consider offering small grants to training course participants to support them to create tangible outputs and turn theory into practice.

## EVALUATION FINDINGS

## POTENTIAL IMPLICATIONS / THINGS TO CONSIDER

### Training courses:

The sessions have been enjoyable and sparked inspiration, but have, unsurprisingly, perhaps not been as effective in supporting long-term change as the cohorts.

The project has demonstrated that multiple participation – i.e. participating in more than one element of SHARED Enterprise – has far greater benefits than just attending a one-day training course e.g. Ely Museum's fundraising success (see [this link](#)). Consider ways in which to encourage those who attend one-day courses to continue their learning after the course. A one-day course sparks inspiration but deeper learning would take place if participants then went on to, for example, take part in a cohort or make use of the project's learning resources.

### Events:

The conference and funding fairs have ensured that knowledge is disseminated across the sector.

Continue to speak at conferences and workshops to disseminate learning to a wider audience.

### Learning resources:

A comprehensive bank of learning resources and case studies has been created and is online to download for free from the SHARE website.

The resources are wide-ranging, addressing diverse topics including information about funding organisations, behavioural economics, case for support, weddings, and a governance health check.

The majority of resources have been created by the Project Officer and fundraising consultants. A small number of organisations that participated in cohorts or other elements of the project have shared learning via case studies.

Continue to create learning resources e.g. presentations and training material, case studies from participants, video interviews with participants.

### Information and advocacy tools:

A short film and advocacy booklet are enabling knowledge to be disseminated to the wider sector.

Disseminate advocacy tools to a wide range of people via the SHARE website, conferences and workshops.

## EVALUATION FINDINGS

## POTENTIAL IMPLICATIONS / THINGS TO CONSIDER

### Networking, and meeting and learning from others:

Participants highlighted this as a major benefit of the project. They have enjoyed and valued the opportunity to meet others, grow their networks, and learn from and share with others in the region.

Consider creating a 'sharing' event at which those who have had great successes as a result of the project share their learning with people who have not participated in the project, or other interested parties.

Continue the fundraising network after the project has finished.

### Working with external fundraising experts:

The opportunity to work with, and gain tailored advice from, fundraising experts has been of particular value to participants, particularly those who participated in cohorts.

Participants valued the expert fundraising advice of the project officer who provided useful information and helpful and creative ideas, and signposted resources and information.

If future funding allows, consider continuing to offer small grants to museums so they can access professional fundraising advice.

Widely promote the work of the fundraising network advisors and encourage museum staff and volunteers to access this advice.

### Supporting those who have not participated

The staff and volunteers who participated in the project – specifically those who participated in multiple elements of the project – have benefited from taking part e.g. learnt new skills and knowledge, become more confident in fundraising. However, some of the region's museums did not participate in the project, meaning they may still have significant skills and knowledge gaps relating to fundraising and may not be fundraising as effectively as possible, if at all.

Widely disseminate learning and case studies from the project so that other museums in the region are able to benefit from the project.

Widely promote the fundraising advisors so that people who did not participate in the project know they can access specialist advice and understand how they can access this advice.

Consider how museum staff and volunteers (including trustees) who did not participate could be encouraged to participate in future fundraising training. This could form the basis of future consultation with the region's museums.