

CREATING A FUNDRAISING STRATEGY THAT MAXIMISES SOCIAL IMPACT

A funding strategy addresses how a museum pursues its mission and continues to attract the resources it needs to achieve that mission over time. Because of the ever-changing nature of the environment in which museums exist, funding strategy is a dynamic, continuous process requiring both creativity and critical thinking to gather and deploy resources effectively.

Below is a template for a fundraising strategy.

<p>1. Who are you? Where are you?</p> <ul style="list-style-type: none">○ Mission statement○ Vision/aims of project/exhibition○ Your collections/stories/messages○ How are you creating change? Making a difference?○ The resources that you need / how much? This can include in-kind support○ Partners○ Know your location: statistics, demographics	<p>2. Who cares?</p> <ul style="list-style-type: none">○ Finding and researching funders○ Different funders and their point of view○ Different types of funders that are out there○ Newspaper cuttings○ Create profiles on sources○ Events - what are you selling at specific event?
<p>4. Adopting a working strategy</p> <ul style="list-style-type: none">○ Things that you can do continually○ Regular reviews, keeping folders etc.○ Produce case for support○ Letters of support○ On-going public feedback○ On-going research○ Create more profiles○ Events, images○ Constant external awareness○ Always get feedback○ Always say thank you	<p>3. Demonstrating public need</p> <ul style="list-style-type: none">○ Refer to step 1 and get more detail○ Existing research, evaluation○ Who are your beneficiaries? Who doesn't visit and why? (Fundraising to facilitate change)

EXAMPLE

<p>1. Who are you? Where are you?</p> <p>City Museum, 80,000-100,000 visitors Mission: <i>"To help people determine their place in the world and define their identities, so enhancing their self-respect and their respect for others"</i></p> <p><u>Aims</u> <i>An exhibition, Dress codes: one hundred years of uniform and identity in my town</i> <i>Youth Programme, What are you looking at?</i> <u>Aims:</u> focus on education and training for young unemployed people; attract more 14-24 year olds into the museum <u>Resources needed:</u> <i>Staffing 10k; Programming 25k; Education costs 8k; Marketing 8k; Exhibition costs 12k; Evaluation 5k</i> <u>Partners:</u> Princes Trust, Job Centre, local school, young offenders institute, drug rehabilitation centre, care home <u>How are you creating change?</u> Unemployment statistics, local qualifications (related to our local area – we know where we are)</p>	<p>2. Who cares?</p> <p><u>Starting from who we've got:</u> Trustee, volunteers <u>In-kind:</u> Community payback scheme, DIY store <u>Funding Trawl:</u> Paul Hamlyn Social Justice fund <u>Local newspapers:</u> Individual donor, matched through marketing story <u>Corporate:</u> High Street Fashion Retailer <u>Creative:</u> Arts Council and iPads <u>Public Appeal:</u> Items for exhibition <u>Unsuccessful:</u> Council application Develop internal advocates to begin a cultural shift – get comfortable talking about money!</p>
<p>4. Adopting a working strategy</p> <p><u>Things that you can do continually:</u> <i>Added prospects researched to database along with any feedback from unsuccessful applications</i> Regular reviews, keeping folders etc: <i>Reviewing unemployment statistics</i> <u>Produce Case for support:</u> <i>Exhibition story book</i> <u>Letters of support:</u> <i>Logged positive letters from participants</i> <u>On going public feedback:</u> <i>Visitor figures, quotes about the project</i> On-going research Create more profiles Events, images <u>Constant external awareness:</u> <i>Letter (negative press)</i> Always get feedback <u>Always say thank you:</u> <i>Story Book</i></p>	<p>3. Demonstrating public need</p> <p><u>Research, advertising and demand:</u> <i>Swap Shop, vox box, iPads, images</i> <u>Who doesn't visit and why? (Fundraising to facilitate change):</u> <i>Market stall</i></p>

Workshop script:

Today we are going to present our thoughts on how to create a fundraising strategy template for museums. This session is designed for smaller museums with no dedicated fundraising staff, who want to maximise their social impact. My name is Jessica and I am going to present an example of a fundraising strategy template, which you can see on side one of your handout [page 1 above]. This outlines the four steps that you can adapt for your own needs.

Hello, my name is May and I am going to be talking you through our hypothetical example on the second side of your handout [page 2 above]. This gives practical examples of how you might develop your own fundraising strategy template. At the end of the session we will conclude with your own experiences, questions and ideas and we will give you our resource pack. If you would like a digital copy of this, please leave us your email address on the sheet that we will circulate towards the end.

So, let's start by asking, what is a fundraising strategy?

A fundraising strategy addresses how a museum pursues its mission and continues to attract the resources it needs to achieve that mission over time. Because of the ever-changing nature of the environment in which museums exist, funding strategy is a dynamic, continuous process requiring both creativity and critical thinking to gather and deploy resources.¹

So for the purposes of our example, today we are a mid-sized free entry city museum with 80,000-100,000 visitors. We want to put on an exhibition called *Dress codes: one hundred years of uniform and identity in my town* which utilises our existing collection, that includes miners work clothes, prison officer uniforms, and a regimental collection.

It will also include displays on clothes and their messages addressing subjects such as gang colours, school uniforms, and tattoos.

In addition the project will include a youth programme called *What are you looking at?* which will work in partnership with the local fashion college street artists and youth unemployment programmes.

The aim of the project is to attract more 14-24 year olds into the museum because research has shown that this is one of the least likely groups to come through the museum door.

So, STEP 1 is to establish who you are and where you are.

Fundraising for social impact is about actively demonstrating change, and to do this a clear idea of who you are as an organisation, what you stand for and an awareness of your

¹ <http://linkd.in/hOGmRV> Accessed 31.01.11

environment is a must.

Having a specific idea and a clear objective is key since it provides something that is tangible to both staff and donors.

Knowing who you are means incorporating your mission into everything you do. Your mission statement includes your ideological standpoint, connecting your collections, stories and messages and engaging the world in what you do.

At our example museum, our mission - which for today's purposes has been borrowed from Tyne and Wear museums - is: *to help people determine their place in the world and define their identities, so enhancing their self-respect and their respect for others.*

The aim of the project is to tackle issues related to youth unemployment and to retain relationships with the groups involved after the end of the exhibition e.g. by establishing a youth board.

The resources that we will need include £10,000 for staffing, £25,000 for programming and education costs, £8,000 for marketing, £12,000 for exhibition costs and £5,000 for evaluation, totalling £60,000.

We have identified the Princes Trust, local Job Centre, local schools, a young offenders institute, a drug rehabilitation centre and a local care home as potential partners.

We are creating a change and making a difference through this project because statistics show that youth unemployment in our area is 40% - nearly twice the national average - meaning that this is a legitimate local issue for the museum to address. What's more only 20% of local pupils achieve five or more A* to C grades at GCSE level compared to a national average of 40%.

We know what works well already since we have built a good market for the under fives and for women aged 55+.

STEP 2 is about finding out who cares.

In this step you find and research potential funders from on-going and specific project based research. Remember you are helping funders deliver their aims and objectives because they cannot do this on their own. They need people like you and your museum to do it for them. For example – they want to help older people with dementia – your activity meets this funder's need. Think of it like Match.com for museums!

Finding out who cares or who doesn't also establishes the viability of your project. Check your basics. Are your budgets in order? Do you know what core costs you need to recover? Do you know what other applicants are doing?

There are a variety of different types of funders out there in addition to local and/or national

government funding which include trusts and foundations, corporate prospects such as companies and businesses and individual donors. Within the *individual* group, this can be further divided as: visitor giving (everyday visitors), members of a friends/supporters group, trustees/volunteers, patrons, major donors and legacy givers.

Finding out who's out there is an on-going process. We recommend creating research profiles on potential funders and updating these with newspaper clippings and stories within relevant publications such as Museums Journal. These can be kept within an organised filing system or database for ease of access and updating. Remember to make use of who you've already got on board – use your contacts and previous funders when appropriate.

Events can also be very good ways of networking in order to find out who cares.

In our city museum, we used our museummatch.com approach to find suitable funders.

- We started with who we already had on board and received £5k from a Trustee. We worked out that through in-kind contributions from our existing volunteers we were able to contribute a further £5k to staff costs.
- Further in-kind support was provided from people from the local community payback scheme who are giving us a further £2k by painting the exhibition space and the local DIY shop is providing the paint.
- Though a trust and foundation funding trawl we found the Paul Hamlyn Social Justice fund who are funding the young offenders programme - £20,000
- For funding the youth programme we approached John Lewis who are funding a youth training programme - £10,000
- Through general reading of local newspapers we found an individual donor - a local football player who we saw organised a fundraising event for a school and talked about the importance of education to him - £5000
- When the story of our project appeared in the local paper, local resident Mr Smith offered to match the footballer's contribution
- Because of the fashion aspect of the exhibition we approached a high street fashion retailer who have agreed to cover corporate entertaining costs and snacks and drinks for the youth programme, the opening, other community events and for the construction of a catwalk - £6000
- The Arts Council agreed to fund the purchase of 6 iPads to be used within the fashion project to generate digital content with the understanding that they are then sold on via eBay. - £2500. This will raise funds in order to retain relationships with the groups involved in the project through funding a youth board. The youth board will shadow the regular board and young participants will gain important skills, with the museum board members acting as mentors to the young people involved thus providing useful training and important skills which will benefit the people involved after the end of the project.
- We also set up a public appeal for the project which included a request for artefacts to go into the exhibition such as uniforms and photos.

Unfortunately the Council were unable to support this project financially as they had already

committed funds to another arts organisation and they stated that our project did not meet their requirements compared with the successful organisation whose collection was thought to include works of art of greater importance and therefore was more likely to pull in international visitors to the area. We have logged this feedback in our database under our council entry and will be sure to try and tailor our application closer next time! We will also have plenty of examples from our successful project to provide them with.

STEP 3 is about demonstrating public need. This relates to what has been discussed in step one but is about getting more detail and a more complete picture of your local context in line with what you want to do.

- What visitor research do you have? What research have you done and what is it telling you?
- Who are your beneficiaries? Who doesn't visit and why? This matters if your aim is to create lasting social change and create sustainable social impact.
- Check what other potential applicants are or are not doing. This can give you an idea for something to do that no one else is, or the potential for a partnership opportunity. To this end, we do not just mean other museums – think wider – shops, other cultural organisations etc.

In our museum, we held a swap shop event in the museum to advertise the exhibition which got people talking about clothing and what it meant to them – we set up a vox box where people talked about the items they'd swapped and what their 'fashion' meant to them. Visitors also created fashion designs on the iPads which were incorporated into the final exhibition and were made available to our virtual audiences and at a computer in all of the district's libraries. The information gathered proved that there was a demand for this project and crucially got younger people through the museum door. The vox box videos became part of our case for support for further funding applications.

We commissioned a local photographer to take photographs of our awareness event and created a log of images to use in future applications.

We used this creative and lively evidence in addition to the hard-hitting statistics about youth unemployment in our city to make our case.

We hired a market stall in the local market for £20 for the day and took items from the handling collection and photos from the above event to talk to non-visitors and seek their opinions about what we should be doing for them. We included their testimony in our funding applications.

STEP 4 is about adopting and maintaining a working strategy. This means incorporating the above actions into continual activity.

- Review your research and prospects and make sure your database is maintained. Remember also to include feedback from unsuccessful bids and log all contact and comments, positive and negative.

- Produce a case for support – which is like a business plan for your project. This is a public document, which pitches your case for your project for a range of funders. It is likely to include images, examples of where you've made a difference in the past and the background to why you want the project to happen.
- Keep a log of letters of support, on going public feedback (visitor books, letters to the editor in the local press). The case for support is the why/what/when/where of your project. For both public and internal use, it ensures everyone is on message in terms of what you are trying to do. You can also do mini versions and have more than one version, and/or adjust to suit various learning styles.
- Demonstrate supply and demand to show you are meeting the needs of your audiences. Commission research to determine that there is a demand from your target groups for your intended activity that funding is going to enable you to achieve. This loops us back to step one because it is very much about knowing *where you are*.

Build communication into everything you do - always get feedback, always send reports if requested or information on the progress of your project and always say thank you!

Back at the museum, we added all the potential prospects we identified to our on going research pool and updated information on who else they're funding and any relevant news – even if they hadn't funded our project!

We created an exhibition storybook, which showed the difference we made. This included images, quotes collected from participants and statistics from our original applications. We circulated this book to our funders and included a special thank you page at the end, which was also signed by all the young people involved. We created an e-book and advertised it through twitter and facebook, which meant that the people involved shared it with their friends and family. The local clothing retailer and DIY store were thanked publicly within this publication. We set out the difference their investment made to these young people's lives. They are now members of our corporate scheme and are keen to hear about our future projects.

We have kept our original research about youth unemployment and have updated this when new information has become available and are creating a database of local, national and international issues that can potentially be explored in future projects.

Because of our on-going research we were able to see a jump in visitor figures in 14-24 year olds and relayed this information to our project contributors.

However, we did receive some negative press through a letter in the local paper in which a woman said youth unemployment was not something museums should be dealing with since her husband had died in the war and that this was not a respectful way to treat regimental collections. However, we felt that this in fact strengthened our case since it gave

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us something to work on for the future in terms of communicating our aims and objectives to our local audience and strengthened our commitment for social change.

This showed that museums are contested spaces and people from very different backgrounds find significance in their local social history museum in different ways and that this is something we need to continually negotiate. This links back to Step One because it enabled us to re-evaluate why we do what we do in line with our mission and critically – for whom? Who are we? Where are we?

We remember that, “Our Mission is to help people determine their place in the world and define their identities, so enhancing their self-respect and their respect for others.”

These are our ideas. Now we have a few minutes for you to contribute your own: any questions?

CREATING A FUNDRAISING STRATEGY THAT MAXIMISES SOCIAL IMPACT – RESOURCE PACK

1 WHO ARE YOU? WHERE ARE YOU?

Find statistics about your area at:

- The Poverty Site – the UK site for statistics on poverty and social exclusion
www.poverty.org.uk
- UK National Statistics <http://www.statistics.gov.uk/hub/> Includes census data.
- Request Arts Council Area Report Profiles for your area. They provide detailed profiles on your local population. You can also request detail on wider audiences with for example a one-hour drive time from your museum. In Yorkshire these are freely available via cultural marketing company &co www.andco.uk.com
- Centre for Cities <http://www.centreforcities.org/> follow links to city tracker and the Annual Cities outlook report
- Your local council website, although data can be difficult to read. Find someone to talk to face-to-face from the regeneration or housing department
- Index of Multiple deprivation. 2011 data for England available at <http://www.imd.communities.gov.uk/> For a summary and further links go to <http://www.guardian.co.uk/news/datablog/2011/mar/29/indices-multiple-deprivation-poverty-england>
- Acorn or Mosaic UK data provides classification via postcodes. From postcodes analysis, you can therefore assess your visitor and non-visitor profiles and determine who is missing; who is coming from where and who your existing visitors are. You can also see how representative your audiences are and then identify audiences that you want to develop and map where they live.
- If you haven't already, consider commissioning some audience analysis/audience development work. Consider teaming up with partners and buy in as a group.

2 WHO CARES? KNOWING ABOUT FUNDERS

Different types of funders that are out there

- Corporate
- Trusts and foundations
- Individuals (both high worth individuals and every day donations e.g. member schemes, visitor giving)
- Public Sector

RESEARCH

Finding and researching funders is both ongoing and a specific project.

We recommend creating **RESEARCH PROFILES** on funders which can easily be updated and shared between colleagues. (Templates attached to the end of this document).

An ongoing process of knowing what's out there:

- Check local and national papers for news on who's getting funding and from whom in the arts. See also Museums Journal and charity specific publications such as Third Sector.
- Create **research profiles** to record funding activity and easily updateable info
- Set up a database to log information – standardise the layout into reusable headings in order to make it easier to follow / be adopted by other members of staff. This can be done in Excel or in a word document (hyperlinked headings are great for this!)

A specific funding trawl for your project.

Stage One – Who have you already got?

- Who has funded you before? Do you have regular funders or someone who funded a project a few years ago and might be interested again?
- Brainstorm your existing contacts: internal, local, regional, national, international
- Review above funders you've already found from news

Stage Two – What else is out there?

- Who has funded something similar? Have a look at the websites and promotional material for similar projects and exhibitions and add any potential funders to your list

THE FUNDING TRAWL AND RESEARCH: Know your project – have a breakdown of the different component parts, costs and requirements.

Full cost recovery

http://www.hlf.org.uk/HowToApply/furtherresources/Documents/Understanding_full_cost_recovery.pdf

http://www.biglotteryfund.org.uk/index/funding-uk/full_cost_recovery.htm

- **T&Fs** - There are a number of search engines available for finding trusts and foundations: Funding Central (free), Guidestar (free), Trustfunding.org (paid, starts from £300 per year upwards based on users BUT free access is available from the DSC office) Grantfinder (paid)
- Other resources for information – The funders own website is usually the best place to start! Also newspapers and their websites (searchable), Goggle/search engine for general info, BBC website, Wikipedia (remember to follow the links for more info), Charity Commission for annual reports and financial info and the Trust directories available at the DSC (see below for contact info.)
- T&Fs sometimes know more than you e.g. use and design of learning spaces, impact of social justice programmes, so consult them on it.

- **Corporates** – Think creatively!
 - Who might be interested in being associated with your project? Are there companies who fit the theme? E.g. sports companies and supermarkets for health and fitness, shipping companies for maritime exhibitions, clothes retailers for fashion exhibitions etc. Also – who's local? National companies often have regional headquarters so check it out! Are there new upcoming businesses that might want some positive associations with local heritage and culture?
 - What would they get out of it? – Positive association/local investment
 - CSR – large companies usually have a section for this on their websites – read annual reports for more info and note the contact you need to speak to about CSR
 - Who's doing well at the moment?
 - Financial Times
 - Read business sections of local and national newspapers
 - Annual reports / websites of businesses / Wikipedia also often publishes data on larger companies
 - In-kind support? Are there services or materials you could request?
 - Check news, search engines for general info
- **Individuals**
 - Review who has given to museums/similar projects recently (from your ongoing news research), check Sunday Times rich list/giving list and keep an updated database of people who may be interested in supported your organisation. Who's local to your area? Not everyone has Richard Branson living up the road, but there may be another successful entrepreneur who'd love to give something back to the area
 - Don't forget your everyday visitors: capture visitor data such as email addresses. Important for Gift Aid and to generate a large pool of donors who have the potential to become regular supporters
 - Visitor giving provides unrestricted funds
 - Know your visitor profiles so that you can target them with specific messages and in the right way e.g. how are you communicating your need for funds? Donation boxes, well placed and attractive signs, clear messages about need and outcome i.e. what you are able to do with the funds. Show how you make a difference rather than standard stuff about what you do. How is this memorable? Is it a positive message? People like to feel good about giving.
 - Individuals can be cultivated and moved along a supporters line, although not all start at the beginning of the process: incidental donors - enquirers/responders – donors - members/friends – regular donors – committed donors – high value – major donors – pledgers – legacies

•Newspaper cuttings

•Events - what are you selling at specific event? Remember that events need sponsorship or they are likely to run at a loss

•Appeals and Memberships, direct mailings

•Build relationships with solicitors – they can encourage legacy giving and know about sleeping trusts

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Resources:

Watch Michael Kaiser's Fundraising Seminar parts 1 to 6 on YouTube

<http://www.youtube.com/watch?v=EgSI3VotqoA>

<http://www.dsc.org.uk/Search/ContactUs> Liverpool and London offices of the Directory of Social Change both have free to access libraries which include funding directories such as Guide to the Major Trusts volumes 1 & 2 and the Directory of Grant Making Trusts and all DSC websites including TrustFunding.org <http://www.dsc.org.uk/Services/Libraryservice>

EASTWOOD, M. & NORTON, M. *Writing better funding applications - A practical guide*. Directory of Social Change. 2006 - a good, practical book on how to write bids and cost up projects

Use the Business and IP Centre at the British Library (also just a few minutes walk from the London library of the Directory of Social Change). You need to get a free reader's pass first to get in.

<http://www.bl.uk/bipc/> You can attend useful free events here, such as Researching a Company as well as research various commercial leads on your own.

<http://www.institute-of-fundraising.org.uk/>

Arts & Business have a free advice line on fundraising topics. Open Monday to Friday 10-4pm 0300 123 4000.

T&F tools

<http://www.grantfinder.co.uk/>

www.trustfunding.org.uk

<http://www.guidestar.org.uk/>

www.charity-commission.gov.uk

<http://www.fundingcentral.org.uk/> - Very user friendly: Search Engine facility also has a useful news email bulletin about upcoming funding which you can tailor to your organisation

Individuals

<http://www.philanthropyuk.org/grant-seekers>

<http://www.debretts.com/> (or book)

Sunday Times Rich List

Sunday Times Giving List

Arts Power List

Who's Who

Thepeerage.com

Other research shows that 76% of people would give more if they knew exactly how their money is going to be spent e.g. a tangible connection like buying a brick.

25% of people say that the reason they don't give more money to charity is because they weren't asked to.

Penelope Burk's research on *Donor-Centered Fundraising* is based on feedback from donors in Canada and the USA. Through many interviews with donors, she learned that only 20% want public

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recognition.

What most donors want are three things:

- 1) To be thanked promptly with some form of meaningful acknowledgement;
- 2) To be reassured that their donation would be used for the purpose they intended; and
- 3) To receive a report on the results of their last gift before they are asked for the next one.

Donors told Burk that the amount of their donation is based primarily on what the organization asks for, and is frequently much less than they are willing and able to give. So by asking for more, you may get fewer donors but you will get more money. Donors also say that being asked by a trustee influences the more than anything else to give – and give generously.

Many more donations are likely to follow after existing donors receive a signed thank you letter or email.

Executive summaries of full US and Canadian reports can be downloaded here.
<http://www.cygresearch.com/cds2011/> Each full report costs \$75.

Check out <http://museumpreneurs.org/> for other quick ideas on income generation.

Make it easy for people to donate. Is your charity status visible to visitors? How about on your home page on the web? Does your home page also have a 'donate now' button on your home page and how easy is it the giving process from here? See for example <http://www.liverpoolmuseums.org.uk/development/>

Text to donate: service available via Vodaphone/Just Giving, BT and Virgin. See for example: <http://www.guardian.co.uk/money/2011/may/09/vodafone-charities-donations-justgiving> Although this might not raise much, it provides a critical mass, which advertises the fact that you need money and accept donations. So this is more about the message than the total amount raised.²

3 DEMONSTRATING PUBLIC NEED

Commission some research to show evidence of demand.

Learn how to present 'sticky' stories - Make to Stick <http://www.heathbrothers.com/>

4 ADOPTING A WORKING STRATEGY

Keep note of who you've applied for and when – try not to reapply too soon unless the funder has specified this is ok – T&Fs in particular can state no applications in 12 months etc.

Do people generally get that you are looking for money? Make sure people from all groups know that you are actively fundraising all the time and that you are looking for financial support. You can also ask people which areas of your work they want to support.

² This advice developed from a Yorkshire Fed conference session led by Rob Shaw from National Museums of Science and Industry, 10 June 2001

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Create a Fundraising Calendar – Note when useful resources such as the Sunday Times Rich list comes out, deadlines for particularly relevant T&Fs, rolling deadlines etc (if you use Outlook you can set reminders)

Check the DCMS spending review settlement letters for the DCMS sponsored organisations in your area. <http://www.culture.gov.uk/publications/7507.aspx>

For example, in his letter to Tate, Jeremy Hunt says: “Given your role as a leading national museum, I hope you will be able to support and mentor smaller museums and galleries across the country in fundraising.” Is this happening? How is Jeremy Hunt checking that his expectation is being met?

APPENDIX 1 – quick tips on writing clearer funding applications

Four ways to using evidence to strengthen your funding requests:

1) USE QUESTIONS

Helps to set out the problem or change you want to make, 'flips' the focus. Rather than long, explanatory paragraphs, try:

What is the cost of inaction?

Why aren't museums more family friendly?

How can we help museums improve services for families?

Who cares?

2) MAKE STATISTICS SIMPLE AND HARD HITTING

Don't overwhelm the reader with figures.

Which of the following have the greatest impact and why?

a) In the UK today, 13.2 million people live in poverty.

Or

b) In the UK today, 13.2 million people – more than one in five – live in poverty.

a) One in three children live in poverty in the UK.

Or

b) 74% of all Bangladeshi children live in poverty in the UK.

NB - Percentages are the easiest to remember.

a) Disabled adults are twice as likely to be within low-income households and adults living within in the poorest income areas are twice as likely to be in low-income households.

or

b) 50% of families with disabled children live on or below the poverty line.

3) TELL STORIES

a) Statistics or language involving figures, multiplication, budgets are more powerful when you relate

them to something else.

People give twice as much when they read about an individual compared to a statistics only approach.

Use stories to write about the solution as well as the problem. Use them to give detail to a bigger picture.

b) You can tell a story within your application, which will help your reader along, creates flow: so go from identifying **the problem** to **the solution** to **the resources required** to **how the funder can help**. The funder therefore becomes part of the story.

Consider telling a story of something that went wrong, or how you have used negative feedback to your advantage and made a lasting, positive difference.

4) USE QUOTES IN DIFFERENT WAYS in your applications

a) Use them to surprise, to help get you to the point ASAP or to endorse your organisational values.

For a Kids in Museums appeal letter: "Museums should be places where we can think, contemplate and study, they're not places for rowdy children to giggle, shout and spoil everyone else's enjoyment." We disagree.

Slavery Museum visitor: "I do not think this is the rite place 2 teach young people history. It is silly and full of shit"

"Middlesbrough it is what it is, bloody awful." Steve Gibson, Chairman of Middlesbrough Football Club.

b) To elicit emotion: "I just thought, 'what are you talking about? I don't belong here.'" We want to make a difference to the way young people feel about visiting their local museum...

c) To give your appeal weight, try authority-figure quotes. "Museums will only be effective if they value the needs of their audiences above everything." Andrew Motion, Museums Journal, Sept. 09

Use quotes to show you know what is going on in the wider world; include current references and links to policy. You can then agree or disagree with it, showing what your museum is doing to make a difference. Or show how innovative you are and get your ideas adopted as national policy for others to follow!

d) Use quotes to shift the tone in applications, to keep the interest going. Spread them out; use them to break up dense text and to create pace.

e) If you are stuck on where to start, open with a quote to fix your position, you can always cut it out at the end. So if you want funding for a contemporary arts exhibition, linked to your social history collection, a quote from a visitor might show the change you're aiming for:

"Modern art is esteemed. We don't understand it but if it is a way of drawing attention to our city then that has to be good. It gives us recognition. We know it is elitist but if we don't accept it then we don't get the funds. It is as simple as that."

APPENDIX 2 – research profile templates

INDIVIDUAL

NAME

CONTACT

Full Name including titles and honours etc (always important to get this right! Check Debrett's guide for info on correct address)

Address (Work/home)

Telephone number

Email

Website

Blog (if applicable)

BIOGRAPHY

Include as much detail as you can find – you never know what might be relevant later.

1. Date of Birth
2. Education
3. Career development
4. Interests and hobbies

CAREER

List previous posts held with dates for easy reference

PREVIOUS CONTACT

Have you received anything from them before or had a visit?

RELEVANCE TO ORGANISATION OR PROJECT

Why might they want to be involved? List local links, interests, hobbies, organisational affiliations.

WHO ELSE HAVE THEY FUNDED?

Have they given to any other causes or projects? List details

RECENT NEWS

Is there anything in the news source about this person? Activities, business ventures, remarks in the press, opinion pieces, blog/twitter posts

SOURCES CONSULTED

Useful for your own reference – and for future updating

CORPORATE

NAME OF COMPANY/BUSINESS

CONTACT

Name of person who is the primary contact (will usually be stated on website, check if there is a CSR or Sponsorship contact)

Address

Telephone number

Email

Website

OVERVIEW

Include here the most important information e.g.

- a. What types of company is this? What do they do?
- b. How long have they been around and where are they based?
- c. Why might they be a good prospect?

FINANCIAL INFO AND STATS

This tends to be a bit more complex than with a Trust or Foundation so allow more space.

What is their turnover, sales and profit? As up to date as possible but if older info is available it's often useful to see how the company's doing over time. How big are they? Number of employees, sites etc.

PREVIOUS CONTACT

Have you received anything from them before or had a visit?

CORPORATE SOCIAL RESPONSIBILITY

Often companies will have a specific section of their website and annual report dedicated to this. Include examples and previous giving. If there is no specific section, sometimes you can get a feel for their CSR angle through their mission statement – what's their angle? (E.g. Health and fitness, environment, social etc)

HISTORY OF COMPANY

How and where did this company start? Note any local or thematic links to your town, organisation or project

HOW TO APPLY

Is there a specific CSR route, application form or person to contact? What are their requirements or criteria?

WHO ELSE HAVE THEY GIVEN TO?

Include anything you think is relevant and how much, remembering to note the year it was given

RECENT NEWS

Is there anything in the news source about this Company? Any new business ventures, activities, new CEO etc? Pay particular note of any potentially negative press which contradicts your own Mission.

SOURCES CONSULTED

Useful for your own reference – and for future updating

jessica.m.moody@gmail.com
may.redfern@mac.com

TRUST AND FOUNDATION

TRUST NAME

CONTACT

Name of person who is the primary contact (will usually be stated on website)

Address

Telephone number

Email

Website

OVERVIEW

Include here the most important information e.g.

d. Aims of the trust – what are their key funding strands?

e. How much money do they have and how many grants do they give?

PREVIOUS CONTACT

Have you received anything from them before or had a visit?

MORE INFO ON A PARTICULAR STRAND OR ANGLE

Include here more detailed info on relevant areas of funding

INFO ON HISTORY OF TRUST or relevant points

Sometimes the historical origins of a trust can be an interesting angle when applying – the founder may have visited your museum or taken an interest in the theme of your project or the trust may have been set up in response to a social issue your project addresses.

HOW TO APPLY

There may be a particular application form or requirements stated by the Trust, if so, include details here and web links if applicable. Also note any specific instructions such as 'no emails' or if they request your annual report.

WHO ELSE HAVE THEY FUNDED?

Include anything you think is relevant and how much, remembering to note the year it was given

RECENT NEWS

Is there anything in the news source about this Trust? New members of staff, research angles, quotes and even controversy?

SOURCES CONSULTED

Useful for your own reference – and for future updating.