

FUNDRAISING FOR FRIENDS GROUPS

by Alan Swerdlow

What is the money for?

From the outset the Friends committee needs to be clear about what it is raising funds for and this should be set out in their Constitution. (This may not always be among their museum's own fundraising projects.) At times you may be asked to provide a part of the total required and in many cases can offer the crucial pump-priming sum that catches the larger grant from a major donor such as Heritage Lottery Fund or The Arts Fund. A separate document should provide the wording for a Funding Policy. The Friends may focus on a particular aspect of work such as education or conservation: there should never be a conflict of interests.

The Association of Independent Museums (AIM) has produced a series of invaluable Focus Papers which are available to download. The second edition on fundraising issued in April 2006 is essential reading and should be consulted as it has some excellent advice with a series of links to further information as well as a list of useful publications.

www.aim-museums.co.uk

There is also a lot of useful information on the website of the Institute of Fundraising.

Some members consider that the raising of funds for their museum is the prime reason for existing, even above social and educational aspects. Of course, every Friends event should 'wash its face' and not make a loss, but how many groups check whether, for example, the membership subscription even covers the actual cost of producing their newsletter and its distribution (a change from A4 to A5 could make a significant saving on postage). One essential rule is not to arrange an event or activity that does not show a surplus except where funds are invested in a recruitment evening where the benefits may be longer term.

For the museum, the Friends are its most committed group of supporters. When there is a major fundraising need you should be brought in at a very early stage. The AIM paper has a case study in which the Friends of the Laing Art Gallery were set a challenge to raise £75,000

which was more than the total they had donated in their 35 years existence: it tells how they achieved it. The AIM paper also has useful hints about how to set up a capital appeal.

In a previous BAFM fundraising paper Paddie Drake wrote about the appeal he masterminded with Friends of the Ipswich Museums for the purchase of an important painting. The document is available on request and has many interesting ideas.

Fundraising by Friends is usually more modest than those the museum undertakes. Any event or project must be enjoyable for those taking part and should have an element of fun as well as the sense of achievement when the daunting target is achieved.

Membership Subscription Levels

Most subscriptions cover a range of single, joint or family and young person levels but in some of the larger Friends schemes there might be scope for a system of a basic subscription with add-on options for a second member or guest. At higher levels such as gold, silver and bronze, a range of extra benefits may be offered such as an annual special event, meet the curator and so on. While such privileges may seem divisive, they can bring in useful funds from those members who can afford to pay a little - or a lot - extra. Members should be encouraged to set up direct debits to reduce administration costs and to increase retention rates. And what about a space for an optional donation on the annual renewal form as well as the Gift Aid section? For an in-house as opposed to an independent Friends group it may be hard to devise extra benefits as such activities are the province of the museum - but the President or a Patron may be able to provide something special off the premises.

If you have or are planning a web site for the Friends, which should not set itself up in competition to the museum's own web site, it might as a minimum have the application form to download and a Gift Aid declaration form if applicable.

Corporate membership

Many Friends groups invite local, and even national businesses, particularly where there may be a local

connection, to become corporate members at a higher subscription level. Again it may not be in the gift of the Friends to offer much by way of special deals, but a discount on room hire may be available. Some museums themselves are keen to sign up firms as sponsors for exhibitions but Friends should not hold back from seeking Corporate members who may simply sign up to show their civic duty and to get their name mentioned in the newsletter. An historic association with the town could lead to an article in the newsletter, a talk or even a special exhibition of the firm's archives.

The importance of keeping the database up to date is crucial: ensure that it includes current names of company directors or the person who is the contact point. It may be that instead of a renewal notice, an invoice needs to be raised for the subscription that can be stamped for payment within the firm's accounts system. In a large company sending an invitation to a named senior partner or director may be wasted if that person is not available - make it clear that another person can take up the invitation if appropriate.

Events

The BAFM Journal (and website) always has news of other groups' events from which new ideas may be identified. Some are themed events around an anniversary of the museum or the collection, or celebrate a seasonal holiday. Initial enthusiasm for a proposed event needs to be turned into positive action. If the main committee needs a sub-group to take on the management of a special event then be sure that there are suitable people to see the project through. Another cheese and wine evening will not attract the right guests. Bear in mind that many people, especially potential corporate supporters, will have invitations to very smart events and you may not be able to compete. There is nothing worse than arranging a good event and few turn up: affirmative RSVPs do not guarantee attendance.

A big plus can be offering an event or location not usually available to the public - behind the scenes, a tour of the reserve collection or an event in the home of a member perhaps with a chance to look at their own collection. A gala meal with a prominent after dinner speaker can be a draw particularly if the museum is prepared to allow the use of a gallery. But insurance, staff overtime and the possible conflict of interest with the Museums Association's Code of Ethics where a sponsor is involved may be obstacles to be considered.

A local restaurant or hotel may be prepared to offer their venue for a celebratory meal at a concessionary price on which the Friends can add a profit but in many

cases the real money earner may be the revenue from the souvenir menu (but someone has to sell the advertising space), the raffle or auction which can be of appropriate items or of promises ranging from the use of a member's country cottage to an offer to cook a special meal in the winner's home. There are so many ideas - sometimes it may be hard to resist going over the top. But do not underestimate the work involved. The rewards can be very gratifying. And be sure to thank everyone involved.

Legacies

These are sometimes thought of as out of bounds for a Friends group, but in the case of a museum run by an Authority a legacy may have to be channelled through the Friends as a Charity. Occasionally lovely surprises happen when a cheque is received from the estate of a late member. This good news might be mentioned in the newsletter as it may just prompt others to remember in their will all the enjoyment they have received from Friends' activities or from being a volunteer. If talking to lawyers it may help to suggest that any bequests are not restricted to some particular project which could present problems for the professionals. Useful information can be found in the AIM Paper mentioned above. It must be emphasised that fundraising for, and the subsequent managing of, legacies can be quite labour intensive.

Trips and Visits

Apart from the valuable social aspect of trips, a gratifying sum can be raised by arranging days out or longer holidays to places of interest, even if only a small proportion of the membership join these trips. Museums, National Trust (many Friends will also be in the NT so admission is free) and other interesting venues that individual members could not reach under their own steam can be included with the advantage of being dropped at the door a boon for some.

Days out are easy to try as a first step. These do not fall under the Consumer Protection Regulations 1992 which apply for two or more day holidays where transport, accommodation and other aspects of a package require the provision of financial security against insolvency. This can be provided by Bonding or opening a Trust Account in which all money is placed until after the holiday is completed. But this could make for problems when parts of the holiday have to be prepaid. The objective is that in offering a holiday you have to guarantee all aspects in advance of the passengers seeing the 'product'. Your local Trading Standards Officer can provide a set of the DTI's 'Questions and Answers' on The Package Travel Regulations.

There are specialist group travel experts who can work with you to devise an interesting itinerary. Accidents and illnesses do happen and should there be a serious problem the question of repatriation would be covered automatically by an ABTA member company.

Because of their wholesale buying power and contacts the price offered by such firms is often more competitive than a do-it-yourself package. They can calculate the selling price per person to allow one or more free places above a given number of sales. Subject to committee agreement, one of these could be allocated to the member who takes on the not inconsiderable responsibility of planning the trip. Any further free place money could be taken as a rebate to the organisation. The travel firms can cost the holiday according to the group's requirement; a percentage or round sum can be built in to the total as a contribution to the Friends. The viability point might be 30 paying persons. If the selling price for 30 is say £365 then if 45 were to sign up that price could drop to perhaps £330 with the difference going to the Friends as a donation or adding in extra benefits such as a lunch en route. If you have a Patrons or gold membership level a more luxurious 4 star trip could generate even more of a surplus.

One group has found that it makes for a more pleasant trip if the selling price includes meals with wine together particularly on the first and final evenings. This provides a more social atmosphere and is popular with single members. On a longer stay free evenings offer the chance for members to explore places to eat away from the hotel.

Gratuities can be included to save the embarrassment of going round with a hat on the way home. Insurance should be taken out by all participants (compulsory if the holiday is out of the country) and it should be made clear that the Friends own organisation is not insured for accident, injury etc.

Think before you contact the Friends group at your destination. If you would like your opposite numbers to provide some hospitality do make clear that you do not expect too much fuss at the expense of time looking round their museum.

Talks

These are a standard feature for most Friends programmes and as far as possible should make a surplus. A VIP speaker can attract a large gathering and provide useful PR for the group. Meetings need not always be held on the museum's premises. A pub with good car parking, a meeting room and catering can provide a venue for a talk

followed with a buffet lunch and makes for a pleasant day out. There are accepted fee rates for professional speakers. Friends are often in competition with their local NADFAS group in attracting not only the more interesting speakers but also the audience itself. It may be a good idea to have a clearing house for local societies with a similar programme to avoid duplication and a poor attendance on the night.

Collecting Boxes

Sometimes the income from collecting boxes goes to the Friends and this should be clearly stated on the box. Gift Aid forms may be located by the box so that where appropriate the money is put in a special envelope and posted into the box: donations going directly to the Authority can not be Gift Aided. You need to ensure that Gift Aid forms have the correct wording on them and meet the current requirements laid down by HM Revenue and Customs.

Conclusion

It can be very useful to make a register of funds given to the museum over the years. This can often come to a surprising total together with a note of the greater level of funds that the Friends group donations may have released from the Heritage Lottery Fund or The Arts Fund and other donors. You should also know the value of volunteers' time given - and that includes committee meetings. Such a total makes for good negotiating power and may be a story in itself.

It is important to have a good idea of the level at which to seek a donation: some prospects could be prepared to make a more substantial donation than you might ask for - research is crucial. Don't forget that some members simply do not want to do anything more than to support their museum in a low key way and ask for nothing in return other than their newsletter and the chance to attend an occasional talk.