Evaluation of the Fundraising for Archives programme

The National Archives

Report from RedQuadrant

May 2018

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Executive Summary

This report evaluates the success of the Fundraising for Archives training programme, delivered by The National Archives and funded by the Heritage Lottery Fund. The project was a capacity-building and training programme to support the UK archives sector in improving its fundraising knowledge, skills and capacity, and was delivered between 2016 and March 2018.

The programme emerged as a result of the ‘Funding the Archives Sector’ research project, which identified a range of skills gaps and development needs within the sector in achieving sustainable services and attracting external fundraising.

Fundraising for Archives aimed to create a step-change in the level of understanding and implementation of fundraising best practice in the archive sector.

The training focused on ten key areas:

- Financial preparedness: planning, efficiency and resilience;
- First steps in developing a fundraising strategy;
- Building a case for support;
- Developing advocates and in-kind support;
- Capital campaigns;
- Running fundraising events
- Individual giving: legacy;
- Individual giving: crowd-sourcing;
- Individual giving: relationship management (stewardship) and major gifts; and
- Measuring outcomes

By the end of the programme....... 

550 individuals took part from 408 organisations across the UK and beyond

So far 111 people have completed online modules

There were 92 training days and 93 mentoring sessions

Satisfaction was high, with 96% having a better understanding of fundraising options for archives as a result of the training and 96% feeling more confident about fundraising.
Lessons learnt

- One of the biggest factors in the success of the programme was the delivery redesign in 2015, once it was established that the project was not going to work in its current form. The recognition that capacity from attending training is tight in many parts of the archives sector meant that more.

- Running a multi-year project with the inevitable changes in staff will always be a challenge in terms of maintaining continuity and ensuring consistency of quality.

- Recruitment to the cohorts was, nevertheless, an ongoing challenge. The non-user surveyed showed that 50% of those surveyed would have liked to have taken part in the programme but felt unable to. The current financial climate has led to budget and staff reductions in many archive services, particularly in the public sector. Releasing staff for training has become much more difficult, especially if commitment to a programme is required. The ‘resilience’ cohort, set up in 2017 to address these issues demonstrated the programme’s responsive ethos very well.
• Establishing networks across the sector to share knowledge and experience is enormously valuable. The cohort approach and events worked very well but the wider networking less so. The LinkedIn page was not enough, it became obvious that some facilitation is needed;

• The mentoring support was very successful and the offer of individual support with funding applications and other projects was appreciated by participants;

• There is still an issue with archivists having a wider understanding of the finances of their parent organisations. This is often the case with smaller services within, for example, a large local authority but it can be a barrier to obtaining funding and building partnerships;

• Those working in the archives sector are more familiar with grant applications than with some of the more challenging areas of fundraising, such as crowdsourcing or securing legacies and gifts. The programme has helped build confidence in those areas;

• The stability of funding for archive services is still a major concern for many of the participants.

Recommendations

• The Fundraising for Archives programme has made a significant difference to the sector, building confidence and increasing skills. This is demonstrated by the positive feedback and success stories. One of the key successes, according to participants, was the availability of someone to talk to about projects and funding applications. Although the project is now at an end, thought should be given to continuing support, perhaps in partnership with other organisations such as ARA;

• There is a growing challenge in the sector: how do we upskill staff when there is limited capacity for CPD? Releasing staff for training has become much more difficult, especially if commitment to a programme is required. Although it does not have the benefit of face to face learning, online training is a good way of reaching those who could otherwise not take part. With staffing very tight in many services, online modules should continue to be developed and made available and funding sought to develop more;

• Additionally, the mixed approach to a national training programme: cohorts, open call and bespoke sessions, addresses the capacity issue and is one that should be adopted for other training. With the introduction of the ‘resilience’ module in 2017, participants were able to take part where they could and according to the capacity of their service. This was a key reason that so many people attended and benefited from the training, leading to a shift in knowledge nationally;
• TNA could facilitate an online network for the sharing of ideas. The libraries sector has a very successful and active ‘innovation network’, where discussions, reports and examples of good (and bad) practise are shared across the country. This model could be adopted for archives. It would, however, need some facilitation;

• The two events for friends and supporters were very popular and the benefits of shared experience and networking were clearly recognised. There is a need for an ongoing networking forum for friends groups;

• There is much support amongst participants for training materials to be available online, as well as the actual eLearning modules;

• The feedback in Appendix D illustrates that there is a clear need for the training material to continue to be current. Archivists are operating in a fast changing world. Resources can disappear overnight and, equally, new ways of sourcing funding can appear. Some careful consideration needs to be given to how the valuable programme content can be updated in the future and remain responsive to the needs of the sector.

“The program has been a lifeline to beleaguered services, directly giving skills and knowledge. TNA have given leadership and mobilised the sector and wider partners. Things will never go back to how they were before”

Comment from Knowledge Sharing Day March 2018
1. Background

Fundraising for Archives (FfA) is a ground-breaking training programme for people who work in archives, aimed at equipping the sector with the confidence and skills to successfully secure funding for their service. Practical training, mentoring and online content are part of the programme. The programme was funded by the Heritage Lottery Fund’s Catalyst programme. The National Archives (TNA) received a grant of over £489k and aimed to reach 188 archive services across the UK. In fact, 408 organisations had been supported by the end of the programme.

The project began as Giving Value in 2014. Low take-up and uncertainty about the suitability of the delivery methods and capacity of the sector led to a pause in the project to review the programme. The review led to a reshaping of the delivery, ensuring a programme that suited to needs of archive staff and had a reasonable geographical spread. The revised programme became Fundraising for Archives and relaunched in 2015.

The project was delivered in partnership with The Scottish Council on Archives (SCA), Public Records Office for Northern Ireland (PRONI), Museums Archives and Libraries Division Wales (MALD), and the Archives and Records Association (ARA).

FfA offered tailored learning support which could be applied in real fundraising situations. The programme aimed to increase archivists and archive services’ capacity, skills and confidence in fundraising. This was an exciting opportunity for the sector to develop expertise, which would help to secure future investment and contribute to the future sustainability of archive services. The need for fundraising training was identified in the ‘Funding the Archives Sector’ report,¹ and was delivered against a backdrop of reduced public sector funding and increased expectations of securing external funding in archive services.

The FfA project originally aimed to deliver 30 open call sessions and 8 cohorts, delivering fundraising training for archivists and archive services across the UK, including Scotland and Wales.

¹ www.nationalarchives.gov.uk/.../archives/funding-the-archive-sector
The infographic below illustrates the logic behind the development of the training modules:
2. What the project aimed to achieve

3.1 Outcomes

For Heritage

- Heritage will be better managed as archive services will be more financially robust, and archivists and those managing archive services will have a better understanding of the value of bringing a strategic approach to fundraising; and
- Heritage will have increased long term sustainability and opportunities for access and engagement with new and existing audiences

For People

- Archivists and those working in archives will have the opportunity to develop new skills in the areas of strategic fundraising and advocacy as well as specific areas of development activity according to organisational need;
- Archivists and those working in archives will have learned to work with their parent organisations to advocate for their service, and have stronger, more confident services as a result; and
- Archivists and those working in archives will have developed new networks and peer support groups through which to continue to share their learning and continuously develop professional skills.

For Communities

- Archives will be more innovative and flexible in their approach to funding, bringing greater resilience and more sustainable services to their communities. This will increase the opportunities for local involvement in the service, and bring fresh new partnerships to increase the accessibility and reach of the collections. It will increase opportunities for community-built partnerships and volunteering.

In order to be clear about what the FfA programme aims to achieve in the longer term, RedQuadrant have created a simple Outcomes Framework, using the stated outcomes from the original application to the Heritage Lottery Fund and the stated ambitions of the project team.
The outcomes framework articulates what difference the projects were trying to make to communities, practitioners and the wider archives sector. It has been used as the basis for the evaluation and for identifying strategic opportunities going forward.

3.2 Outputs: who took part?

The original proposed project outputs can be seen at Appendix E. However, following the review of the project in 2014 and the changes in delivery methods, the outputs have changed significantly. This is a positive development, the review ensured that the project reflected the capacity of the sector to engage in the training, and the successful delivery has proved that.

<table>
<thead>
<tr>
<th>Total number</th>
<th>550</th>
<th>408</th>
<th>96</th>
<th>1494</th>
</tr>
</thead>
<tbody>
<tr>
<td>individuals</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>organisations</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>events</td>
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</tr>
<tr>
<td>places</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Number of events/activities</td>
<td>Number of individuals attending</td>
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<td>-----------------------------------------------------------------</td>
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<td></td>
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<tr>
<td>Training days</td>
<td>Training days (face to face)</td>
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</tr>
<tr>
<td>92</td>
<td>425</td>
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<td>Conferences</td>
<td>Conferences</td>
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<tr>
<td>3</td>
<td>446</td>
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<tr>
<td>Specific/bespoke single-organisation support sessions</td>
<td>Specific/bespoke, single-organisation support sessions</td>
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</tr>
<tr>
<td>11</td>
<td>48</td>
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<tr>
<td>Mentoring opportunities</td>
<td>Mentoring opportunities</td>
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<tr>
<td>93</td>
<td>93</td>
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<tr>
<td>Webinars</td>
<td>Webinars</td>
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<tr>
<td>3</td>
<td>17</td>
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<tr>
<td>TOTAL</td>
<td>TOTAL</td>
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<tr>
<td>202</td>
<td>1,029</td>
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</tbody>
</table>

### 3.3 Geographical spread

This was a national programme and it was important that archivists from across the country had the same opportunity to take part. The maps below were created using locations provided by participants in all aspects of the programme.
Not shown on the maps are one physical participant from Rome, two online from Texas and one online from Bulgaria.

Training sessions were held in different parts of the country: Birmingham, London, Manchester, Wales and Scotland. Two bespoke training programmes were also commissioned in Gloucester and Cornwall.

Conferences for Friends Groups were held in London and Durham.

eLearning modules and mentoring by telephone were obviously easier geographically and were popular. However, a number of participants extolled the virtues of face to face learning.
3. Project delivery: what actually happened

The training modules
In total, there were 92 training days. The training focused on ten key areas:

- Financial preparedness: planning, efficiency and resilience;
- First steps in developing a fundraising strategy;
- Building a case for support;
- Developing advocates and in-kind support;
- Capital campaigns;
- Running fundraising events;
- Individual giving: legacy;
- Individual giving: crowd-sourcing;
- Individual giving: relationship management (stewardship) and major gifts; and
- Measuring outcomes

Cohorts
There were two rounds of cohorts in 2016 and 2017. Each cohort training schedule ran for approximately six months.

In 2016, they split into geographical areas: London, Birmingham, Scotland and Wales.

45 participants took part in the 2016 cohort and 40 in 2017.

In 2017, in response to issues identified around the capacity of services to commit, there was a ‘resilience’ cohort of 15 participants.

The resilience cohort was designed to meet the needs of archive services that were at the very beginning of their fundraising journey. The training package was tailored to place emphasis on getting the foundations for fundraising in place; to help develop funding streams to support smaller unspecified projects or core funding. It was also designed to suit services which did not have the capacity to commit to a 6 month programme or attend one course each month.

Open Call sessions
Open Call session were stand-alone elements of the training that were open to all within the archives sector. 32 Open Call sessions were held in total.

87 participants attended Open Call sessions in 2016; 94 attended in 2017.
**Bespoke training**

19 people received bespoke, i.e. specially commissioned training:

- 11 at Gloucester;
- 7 at Cornwall; and
- 1 person at UCL (London)

**Online modules**

One of the most successful additions to the programme has been the introduction of e-learning modules on:

- Making a case for support;
- Financial planning;
- Developing a fundraising strategy;
- Measuring outcomes and evaluation;
- Crowdfunding; and
- Building networks and supporters

Three of these are already live online, and the remaining three will be go live as part of the move into ‘Business as Usual’.

Additionally, selected materials from the 11 training courses were made available in the archives sector area of TNA’s website, which is currently going through a refresh. A separate project has been begun by TNA staff to create a ‘decision tree’ with these materials and resources embedded within it.

At the time of writing, 111 people had completed online training modules.

**Mentoring support**

As part of the project-extension phase of the programme, in early 2018, mentoring sessions were offered to:

- Discuss ongoing fundraising needs and offer tailored guidance archive services;
- Aid progression from theory to practice; and
- Learn about fundraising success stories or barriers that were encountered, and consider further steps which can be taken to reach fundraising goals

In total, 93 sessions were delivered. Detail of the range of issues that were raised is at Appendix E but they included:

- Support for funding applications;
- Advice on securing funding for specific collections, including crowdfunding;
- Setting up trusts or foundations;
- Securing donations; and
- Working in partnership with friends groups
Conferences
Two conferences were held for Friends Groups and supporters: one in London, where 52 people attended and one in Durham, with 40 attendees.

In addition, a Knowledge Sharing Day was held at the end of the project, with the presentation of case studies. There were 51 attendees.

Creating a peer to peer network
One of the key aims of the project was to share knowledge and create an online peer to peer network. A LinkedIn group was set up with limited success. Please see recommendations at the end of this report.
4. Evaluation: how we have measured success

RedQuadrant used a wide variety of evaluation methods during the life of the project:

A survey of the first cohort to measure effectiveness of the training

Data from the diagnostic survey undertaken by participants at the beginning of the first cohort, was matched against a subsequent survey carried out once they had completed the course. In this way, RedQuadrant were able to measure progress. However, there are some caveats with this methodology because not all trainees studied each area identified. Additionally, in the light of a separate TNA project that focussed entirely on commissioning and the lessons learned from that exercise, commissioning training was de-scoped from the FfA project. Interestingly, a rise in understanding of commissioning still occurred.

Evaluation focused on the participants’ understanding of the 20 knowledge areas and 15 skills identified as key outcome areas for the course.

31 out of the 33 cohort members completed the initial survey. Only 22 out of the 31 completed the second survey, despite reminders. Although this was disappointing, measuring by percentage of the total possible score against each knowledge or skill area enabled a fair comparison.

Although this was a useful exercise it was time intensive and perhaps not the most effective way of measuring against project outcomes. It was therefore agreed with the project manager that, to make best use of evaluation resources, the survey of the second cohorts would not be undertaken and a final survey of all participants in the programme was done instead.

The full results of the survey are attached as Appendix A. Headline results are below:

A survey of archivists who did not take part in the programme

Using the Archives NRA email network, RedQuadrant surveyed those who chose not to take part in the survey. Full survey results are at Appendix B. 54 people responded and highlights were:

- 50% of respondents had wanted to take part in the programme but had felt unable to;
- 60% cited lack of time as their reason not to take part; and
- 61% favoured online learning as a viable way to learn
A final survey of all participants in the programme

In April 2018, all participants were surveyed, whether cohort, open call, conference attendees or online. 65 people responded. Full survey results are at Appendix C. Highlights were:

- 96% of participants now have a better understanding of fundraising options for archives as a result of the training;
- 96% feeling more confident about fundraising;
- 31% did not feel part of a support and knowledge sharing network; and
- Only 58% felt they had a better understanding of their organisation’s finances

Feedback forms from training sessions

All training sessions had feedback forms for participants to complete. Comments from these have been considered for the evaluation and particularly the lessons learnt. They were used to create the word cloud in the Executive Summary.

Conversations with project partners

RedQuadrant interviewed the project partners in late 2016. They were asked for their views on:

- the importance of the project;
- whether they thought all areas were covered; and
- what they would like the outcomes to be for the sector:

A summary is set out below:

<table>
<thead>
<tr>
<th>Importance of project</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very important for the sector given current financial context – need to be able to look outside core funding;</td>
</tr>
<tr>
<td>Meeting a very strong need – the archives sector needs these skills and doesn’t currently have them;</td>
</tr>
<tr>
<td>Would expect it to be scalable across the sector, so different types of organisations can get what they need from it;</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Being led by experts in field;</td>
</tr>
<tr>
<td>The flexibility is a strength, amending the programme as it goes along – started with ten courses but have dropped a couple for which the take-up was low, e.g. philanthropy, which makes sense;</td>
</tr>
</tbody>
</table>
- An important aspect is that there is choice – different courses and different routes through – that’s why it’s proving successful as people can choose what they need;
- The trainers are embedded, they understand the background, and the cohort approach is working well;

<table>
<thead>
<tr>
<th>Ambitions for the programme</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Ideally, that people feel equipped with the confidence and skills to tackle fundraising for their organisation;</td>
</tr>
<tr>
<td>- Some doubts about the resourcing capacity in some organisations to take it forwards – may depend on the culture of individual organisations and whether this is something they’re pushing for;</td>
</tr>
<tr>
<td>- Confidence is a big part of this and is hearing good feedback from the cohorts – people definitely feel more positive about having a go;</td>
</tr>
<tr>
<td>- Increasingly important to work in partnership and to be able to choose the right partners who will help you do this – therefore partnership working needs to be recognised in the training;</td>
</tr>
<tr>
<td>- The funding bid route is still important – people need skills in filling out the forms, understanding about impacts (what they are, how to measure them), knowing what a successful bid looks like (and when not to bother bidding);</td>
</tr>
<tr>
<td>- There will be 100s in the sector who have been through the training so the skills will be in the sector for some time;</td>
</tr>
<tr>
<td>- Hope is that it creates a virtuous circle – more funding coming into the sector creating the capacity to bid for more and so on;</td>
</tr>
</tbody>
</table>
Observation of training sessions in September 2016

In September 2016 RedQuadrant sat in on of three of the training courses, which were being run simultaneously at The National Archives. The courses were:

- Crowdfunding and digital fundraising;
- Measuring outcomes and evaluation; and
- Friends Groups and volunteers

The evaluator sat in on all three of the sessions at different times and was also able to speak to participants during the breaks. The general sense was one of a successful day, with participants very keen to learn and plenty of interaction and excitement. There was also a clear message that the programme had been responsive to the needs of the archives sector.

The training rooms for ‘Measuring outcomes and evaluation’ and ‘Friends Groups and volunteers’ were full of industry and energy; the trainers used a variety of methods to engage and it was clear that progress was being made. The ‘Crowdfunding and digital fundraising’ course was less successful. The training was much less interactive and the trainer at times seemed ill-prepared. As a result of this the trainer was changed for future sessions.

All in all, a very positive experience and a definite sense of skills being acquired and put into practise. Additionally, from listening to the discussions, it was clearly a two way conversation between trainers and participants. Trainers were also learning and adapting as the programme progressed.

Conversations with delegates at the Friends Event

In December 2016 RedQuadrant also attended the training day for Friends groups in London, which was very well attended. The initiative was clearly welcomed by participants. There were a number of stimulating partnership fundraising examples from different archives across the country that illustrated the benefits of working with friends and community groups.

One of the key messages from the participants was how much they valued the networking opportunities and there was a clear request for more of these opportunities.

Conversations from the Knowledge Sharing Day

In March 2018, RedQuadrant attended the Knowledge Sharing day at TNA. Various case studies were presented:

- Norfolk Record Office summarised how they are improving their resilience in response to the support provided by the Fundraising for Archives programme. They mentioned some of their successes, such as the establishment of a charitable partner and the raising of over £30,000 for the purchase of archive documents and other archive related projects. They also briefly outlined the NRO’s plans to increase their fundraising in the future.
• Hertfordshire Archives and Local Studies shared what they have learnt so far, as they have sought to introduce different approaches to fundraising into day to day activities, seeking donations and funding to deliver HALS learning and access programme activities; the challenges and opportunities they have encountered.

• University of Stirling talked about their Fundraising for Archives inspired crowdfunding campaign where they successfully raised the target fund to help catalogue and digitise the Peter Mackay Archive, a collection of material relating to Southern African history.

RedQuadrant also engaged with participants on the day and asked them to outline the kind of support they wanted from TNA for future fundraising, now that the programme had ended. The resulting feedback is at Appendix D.
5. Success stories

Below are some emails from course participants that illustrate success as a direct result of the training.

University of Stirling

I just wanted to get in touch and let you know that following the course (Crowdfunding, Crowdsourcing and Digital Fundraising) I got the University to do a crowdfunder campaign for our Peter Mackay archive. We set the amount at £8,000 and raised the whole total through crowdfunder and also got some personal donations with the crowdfunder website http://libguides.stir.ac.uk/archives/mackay. A couple of weeks ago the project got a commendation from the Herald Higher Education Awards for campaign of the year. I wanted to say thanks as it is completely down to going on the course on crowdfunding.

Marx Memorial Library

As Archivist & Library Manager at the Marx Memorial Library - a small independent charity with sparse resources but unique historically significant archives - I found the Fundraising for Archives course incredibly helpful. Workshops encouraged participants to think creatively about income generation specific to the sector and to consider key components in a case for support. The resources provided were always informative and the discussion from representatives from a range of different organisations were thought provoking, particularly from the perspective of a lone professional.

Feminist Library

I wanted to tell you some good news:
1. I pitched and got the Library a three year relationship with Tate Modern for programmes, access to database, endorsement, marketing etc. We can either have Away Days there or get discount food! It will really help with bids, and getting Major Donors as we can have a cultivation party there!
2. I wanted to get going on Matrons/Patrons - and I got Ali Smith who is delighted. Upwards!

Gloucestershire Archives

Good news - our bid to Arts Council has been successful : )
Thank you again for all of your very pertinent and helpful comments which made me think much more clearly about what we were trying to achieve and why, and how to communicate that effectively to the Arts Council.

Gloucestershire Archives

I heard today that the Friends have been awarded £10k by Foyle towards fit-out of Heritage Hub. We asked for just short of £50k so the amount is slightly disappointing but considering we were submitting late in the project and proving that furniture supported learning, I feel it
is a good outcome! Next stage is going to local businesses to see if they’ll support fit-out of kitchen items etc. – something I’ve not tried before…. Also crowd funding…. Thanks again for your support.

Gloucestershire Archives

Just found out that our bid to the Henry Smith Charity for £20K towards the EVOKE reminiscence project was successful. YES!! Thanks for all your help with it. Your input - and the Cohort training - was hugely useful
6. Lessons learnt

- One of the biggest factors in the success of the programme was the delivery redesign in 2015, once it was established that the project was not going to work in its current form. The recognition that capacity from attending training is tight in many parts of the archives sector meant that more

- Running a multi-year project with the inevitable changes in staff will always be a challenge in terms of maintaining continuity and ensuring consistency of quality.

- Recruitment to the cohorts was, nevertheless, an ongoing challenge. The non-user surveyed showed that 50% of those surveyed would have liked to have taken part in the programme but felt unable to. The current financial climate has led to budget and staff reductions in many archive services, particularly in the public sector. Releasing staff for training has become much more difficult, especially if commitment to a programme is required. The ‘resilience’ cohort, set up in 2017 to address these issues demonstrated the programme’s responsive ethos very well.

- Establishing networks across the sector to share knowledge and experience is enormously valuable. The cohort approach and events worked very well but the wider networking less so. The LinkedIn page was not enough, it became obvious that some facilitation is needed;

- The mentoring support was very successful and the offer of individual support with funding applications and other projects was appreciated by participants;

- There is still an issue with archivists having a wider understanding of the finances of their parent organisations. This is often the case with smaller services within, for example, a large local authority but it can be a barrier to obtaining funding and building partnerships;

- Those working in the archives sector are more familiar with grant applications than with some of the more challenging areas of fundraising, such as crowdsourcing or securing legacies and gifts. The programme has helped build confidence in those areas;

- The stability of funding for archive services is still a major concern for many of the participants.
7. Legacy: strategic recommendations

- The Fundraising for Archives programme has made a significant difference to the sector, building confidence and increasing skills. This is demonstrated by the positive feedback and success stories. One of the key successes, according to participants, was the availability of someone to talk to about projects and funding applications. Although the project is now at an end, thought should be given to continuing support, perhaps in partnership with other organisations such as ARA;

- There is a growing challenge in the sector: how do we upskill staff when there is limited capacity for CPD? Releasing staff for training has become much more difficult, especially if commitment to a programme is required. Although it does not have the benefit of face to face learning, online training is a good way of reaching those who could otherwise not take part. With staffing very tight in many services, online modules should continue to be developed and made available and funding sought to develop more;

- Additionally, the mixed approach to a national training programme: cohorts, open call and bespoke sessions, addresses the capacity issue and is one that should be adopted for other training. With the introduction of the ‘resilience’ module in 2017, participants were able to take part where they could and according to the capacity of their service. This was a key reason that so many people attended and benefited from the training, leading to a shift in knowledge nationally;

- TNA could facilitate an online network for the sharing of ideas. The libraries sector has a very successful and active ‘innovation network’, where discussions, reports and examples of good (and bad) practise are shared across the country. This model could be adopted for archives. It would, however, need some facilitation;

- The two events for friends and supporters were very popular and the benefits of shared experience and networking were clearly recognised. There is a need for an ongoing networking forum for friends groups;

- There is much support amongst participants for training materials to be available online, as well as the actual eLearning modules.

- The feedback in Appendix D illustrates that there is a clear need for the training material to continue to be current. Archivists are operating in a fast changing world. Resources can disappear overnight and, equally, new ways of sourcing funding can appear. Some careful consideration needs to be given to how the valuable programme content can be updated in the future and remain responsive to the needs of the sector.
### Appendices:

Appendix A - first cohort survey results

#### Knowledge

<table>
<thead>
<tr>
<th>Knowledge area</th>
<th>Before the course % of confidence</th>
<th>After the course % of confidence</th>
<th>% improvement</th>
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Appendix B - Non-user survey results

Attached as a separate document

Appendix C - Full final survey results

Attached as a separate document

Appendix D - Feedback quotes

Comments from first cohort survey

- I thought the programme was most helpful - particularly in its coverage of a wide range of approaches to fundraising, many of which would never have occurred to me. If my scores seem a little ungenerous, it's because I need to reassemble my notes and course papers and go through them again to remind me of what I have forgotten since the end of the course.

- Well delivered. All sessions accessible. Some frustration that circumstances within own service did not mean that I could put into actual practice the main fundraising that I need to do, but am using the skills for smaller scale ventures to at least keep fresh on the techniques.

- The initial six training sessions were very helpful and based in Aberystwyth, however it was disappointing to find that the additional training sessions were based outside of Wales. There were a number of topics that would have been particularly useful - such as securing legacies and major gifts, crowdfunding, working with friends and volunteers, etc. Unfortunately, due to the location where these were based (either London or Crewe) it was incredibly difficult to secure clearance from a line manager for what would have required travel costs and an overnight stay.

- Some elements of the training were delivered better than others - bit inconsistent - e.g. finance elements but found the content relevant, helpful and confidence

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boosting - am now proceeding with first fundraising bid to a grant giving body. This is much stronger in consequence of attending the training. Thanks to Lucy Davis in particular for her input and assistance in driving this forward. I would recommend this course to both new professionals as well as those of us who need to update our skills.

- I found the training to be of great benefit and have recommended it to other archivists.
- Most modules were great - really useful and practical
- I did not attend the above subjects which I've given low scores to - save the crowdfunding (which was delivered by an ill-prepared external party) - however I found the rest of the training excellent and very useful to the sector.
- It was all very useful.
- Thank you for the opportunity to take part in the programme which has been really helpful
- Excellent programme many thanks
- The opportunity to tailor it to our needs was so useful and meant that I was able to bolster the aspects not looked after by my institutions fundraising department and leave out the bits (legacies etc.) which they are expert in. Trainer was excellent as well.
- Useful, but due to other commitments it's been difficult to follow up on some of the recommendations in the way I hoped I would have by now. Useful to have the notes to fall back on when needed.
- I found the sessions mixed in terms of content, and the dates set were very soon after getting onto the course so I couldn't make the first session. The second session was far too basic, and covered things I already knew. The third was very relevant and helpful, but felt rushed as it covered so much in only one day. The fourth had some useful content, but again some that I had covered before.
- Extremely valuable training programme, particularly in the current climate. Course leaders were outstanding!
- I really enjoyed it - well presented, interesting and fun. Usual problem though - you get on the train at the end of the day and never or seldom get a chance to review what you've learnt - but that's a fault that doesn't lie with the programme. I've acquired a new confidence and think in a more 3-D way about fundraising issues now. One issue however - the course constantly referred to 'charities' and a local authority is NOT a charity and can't ask for money or necessarily expect support in the same way. I don't think the answer is to make all the Archives charitable bodies because then we'd have to be out singing for our supper ALL the time, but maybe a bit more on the legal situation of asking for and accepting money into a local authority for a specific purpose (e.g. the Archives!) would be very welcome next time the training is offered.
- It was a privilege to be able to take part
Comments from final survey: what support would you like to see in the future?

- Training on born-digital records
- An ongoing programme would be great!
- Another cohort intake to widen the benefits for other archives!
- Courses covered possible income strands and developing a strategy etc. but not the risk of core funding being reduced as external funds are secured driving the archives to chase funding to simply remain where there were.
- Instigating community participation
- Using Linked-In for cohort communication did not work at all: a Facebook group or an email list for archive fundraising would work better.
- Face to face training sessions, and to meet with others from the sector. In the libraries sector there is an "innovators network" which worked really well to share ideas across organisations, and I think this model could be applicable to archives as well.
- The National Archives has provided good support on grant applications and fundraising including one-to-one advice, ongoing training (e.g. as HLF programmes change) and highlighting new opportunities. With Fundraising for Archives ending it would be good to see TNA continuing to provide good support for the sector
- Influencing within organisation
- Specific advice for small voluntary organisations
Comments from Knowledge Sharing Day March 2018

- More workshops with funders and funding bodies;
- A useful forum place to share ideas and achievements. the LinkedIn group didn't really take off;
- Someone/something to bounce any formulated ideas from and between;
- Benchmark sessions e.g. don't know where to start with fundraising no previous experience crowdfunding small but big impact case studies;
- How to tackle HLF e.g. where to start my project was a failure - evaluating getting back on the horse;
- Making connections services and people who could contact and Are willing to be contacted to offer support and discuss your project;
- Teach a change of culture re-being bashful about asking for donations;
- Case study is most useful it will be good to have more of those online for reference and sharing with colleagues;
• Collaborations with universities to achieve large-scale funding how to go about this how to approach potential partners and how to apply;

• Archive services speed dating e.g. meet and chat those with money ask questions get advice;

• Telephone mentoring course have been really helpful having missed the cohort and done the e-learning it helps to have somebody to talk to you through I’m in the process of chairing the working group to develop a fundraising strategy for the archives;

• I’m using the resources from the e-learning to help us work through the different areas to build our strategy Sarah White has provided me with some valuable information and help me with planning the working group meetings;

• It will be helpful to make as many of the resources and training materials online as soon as possible as I came to the program quite late as new post and it will be good not to have missed out on all the learning;

• More examples of fundraising strategies with case studies Roses presentation was a good example of this;

• It was great to hear how fundraising training had been put into practice case studies top tips and more unusual or risky ideas;

• Really liked meeting other friends groups organisers and exchanging info face-to-face;

• Really excited about the online materials;

• Friends groups were excellent information on governance at the training conference;

• Didn’t find the LinkedIn group very useful I’d like to email a question and get an answer;

• The words business-like and commercial could be encouraged to be used;

• The program has been a lifeline to beleaguered services, directly giving skills and knowledge. TNA have given leadership and mobilised the sector and wider partners. Things will never go back to how they were before;

• Before Christmas I think there was an event where HLF talked about the kinds of projects they fund and what pots of money they have and then you could discuss your project ideas with some more of this would be amazing maybe different locations;

• This program has been really fantastic thank you;
• Please could we hear more examples of what people have done following the training with writing e-learning please add more guidance.

Feedback from mentoring sessions

• Wonderful – thanks for this - really helpful.
• I’m hoping to set my mind to this very shortly.
• Thank you for this. I did indeed change the font straight away! Thank you for reading the Strategy despite the formatting issues. Your advice was very through and covered all the areas I wanted to talk about. It’s given me some positive steps to take going forward.
• And a big thank you – inspiring and useful, really helpful. I am already ‘on’ the mission thing!
• Thanks again for the support – much appreciated by all us ‘lone workers’ out here – and have a good weekend yourself.
• Appendix E: Issues discussed at mentoring sessions (anonymised)Advice for Local Authority archives seeking to fundraise I now have a first draft of our record office’s first Fundraising Strategy! An expert eye would be really useful.
• I would particularly like help with a funding bid I am writing (to Paul Hamlyn Foundation) which centres around diversity in the archives – so any further advice and support around that would be excellent.
• I’d be very grateful for any mentoring and support/advice if possible. I work within a University, and so some of the more accessible funding streams are not available (we are not a small business, not a charity etc.). I also work alone, as an assistant, but with no line manager with archive experience.
• We are hoping to raise funds to purchase a photographic collection from 1 Apr. We need to raise £40k so any advice on achieving this will be most welcome!
• So far we’ve introduced two fundraising schemes: a donations box in our reception and the Adopt a Piece of History scheme (based on the British Library’s Adopt a Book scheme). Neither has been particularly successful so far, so it would be useful to find out if there is anything we can do about that. We’re investigating the possibility of getting a grant to design a website specifically for the Record Office, which will allow us to increase visibility for the scheme, and it will hopefully be included in the online shop we are establishing. It would be useful to know whether there are any issues with the scheme itself, the look of it, the way we’re advertising it, before we increase its publicity
• We are part of a Trust that runs Libraries, Museums, Theatres and Archives. The Trust is keen to generate more income. I and my colleague in Local Studies have an idea for a project with the excellent co-op records we have. We would like to hire an archivist on a temporary contract to work with our volunteers to catalogue the records and to promote them to a wider audience. I do not have
much experience of fundraising and none involving hiring staff on short term contracts.

- I am intending to submit an application to the Wellcome Trust in April and if there was anyone available to bounce ideas off that would be great! Or whatever is on offer really.

- We had a visit from Lucy some time ago which was very useful. Our current situation is that we were rejected by HLF in December (capital bid of £2.175 million plus development costs) so are currently licking wounds and considering best way forward. This is probably in the longer term, a revised bid to HLF. We would still therefore need to do most of what we’d planned to do for the original bid. In addition, we are still looking for pots of money with which to undertake public engagement and collections related work. Not sure if you feel we are a service that would benefit from one of your sessions – or if we’d be wasting your time. If there are more needy cases out there, then obviously it would make more sense to speak to them; however, if there is an advice session that you feel would work for us, then we’d be very pleased to hear it.

- We have previously received project funding from HLF towards conservation, basic cataloguing and public-facing work, but are not in receipt of any external support at the moment. I’m interested in exploring avenues for conservation and cataloguing support for particular aspects of our collections, such as our collections of audio material, photographs, correspondence and business archives.

- We want to establish a supporter scheme with the aim of raising money but to also broaden and strengthen its supporter base. It would be really helpful if we could discuss our plans with someone.

- We currently have a large cataloguing backlog and no specialist archive support so I would be interested to see if there is funding to support this.

- We are looking into various funding streams to get assistance for the cataloguing and development of the archive service. Although we are currently in the process of writing bids from the Wellcome Trust and HEA, any additional guidance would be useful.

- I would appreciate over-the-phone mentoring and support sessions to help learn how to raise funds and sustain our archive. We are all volunteers and need considerable funds to maintain the database and website, Digitise interviews in order to make them accessible, Transcribe the interviews to make their content discoverable, Continue interviewing key crafts people, Train participants in the project.

- I would particularly like to discuss funding for a volunteer programme.

- I am interested in finding out about raising finance to launch a digitisation project.
• We are at the initial stages of putting a fundraising bid together and would be grateful to take up the opportunity for fundraising and support sessions. In particular we are interested in how an integrated heritage site like ours can take advantage of specialist archive funding, and also fundraising for collections digitisation.

• In the first instance I’d really like to find if anyone can digitise our microfiche collection.

• I am hoping to put together a legacy giving campaign (on the back of the last Fundraising for Archives training event I attended) and would appreciate a session to run my proposed text etc. past someone knowledgeable.

• I would like to have a mentoring discussion re fundraising. My particular concern is not grant funding but being more effective in seeking commercial and sponsorship funding.

• Hi, my colleague was on your fundraising training programme last year but has now left our organisation. I have some questions around how to go about setting up a Trust which isn’t a Members’ organisation, like a Friends’ body, but purely a charity for raising funds for an archive service. I would welcome the chance to talk to someone about this.

• Our next fundraising activity will be a crowd-funding project which is a new area for us, so targeted support with this would be very helpful.

• Currently the Friends are fundraising for a multi thousand pounds very long term project to conserve and digitise the wills collection.

• We’ve submitted several applications and benefitted from Lucy’s wise advice. Our next stage is to attempt crowd funding.

• We are currently dedicating time and effort to submitting an application to the Wellcome Trust for engagement with a scoping exercise which if successful may lead to an application for funding for a medical related collection under our care requiring extensive cataloguing and conservation. I attended a Crowdfunding workshop hosted by the TNA in November and found the session productive, but due to all other commitments placed upon us which involves extensive engagement with the public, we are not always able to give the project the attention it requires and we can feel we are floundering, so expert opinion and guidance would be highly beneficial.

• Although I’ve been through the main sessions, I still feel that I’m lacking the headspace to put what we learnt into action in work. I really want to pull together something meaningful as a Strategy for my office and I’d like some individual guidance on this if possible.

• I’d be interested in booking a mentoring session. I’m currently working with a donated collection and trying to set up some kind of study centre around the work. It’s in its very early stages and would certainly benefit from some advice.
• Advice on tapping into diverse funding streams and how to best present a case when your organisation is not obviously an archive