

Business Archive Council, Conference 2013 - Show me the money! – Securing Funding for Business Archive Projects

Boots Archive, Nottingham, Thursday 7 November 2013,

About the conference

The aim of the conference is to look at funding for business archive collections in various institutions. As well as looking at case studies where archives have successfully received funding, and what has been achieved in these projects, the conference will also aim to provide practical advice and information on how to go about securing funding.

The programme:

From 09.30: Registration and coffee

10.00 - 10.30: Business Archives Council AGM

10.30 - 10.40: Comfort break

10.40 - 10.45: Welcome and introduction to the conference

10.45 - 11.45: Breakout session (with tea and coffee)

11.45-12.15: Sophie Clapp Company Archivist, Boots UK - Putting a value on heritage - building a healthy business case, the Boots experience

12.15-12.45: Susan Gentles and Amy Proctor Archivists, Standard Chartered Bank - 'Windows on the World' a partnership project with London Metropolitan Archives

12.45-13.45: Lunch

13.45-14.15: Adrian Steel Director, British Postal Museum & Archive - Opportunities (Let's Make Lots of Money)

14.15-14.45: Stacy Capner, Business Archives Development Officer for Wales, Richard Burton Archives, Swansea University - Forging Links: a collaborative approach to funding for business archives in Wales

14.45-15.15: Tea and Coffee

15.15-15.45: Melinda Haunton Programme Manager (Accreditation), The National Archives Finding funding: the case for business archives

15.45-16.45: Panel Session

Sessions

Sophie Clapp Company Archivist, Boots UK: Putting a value on heritage - building a healthy business case, the Boots experience

Boots' archive is a small department with a small budget which sits under the group procurement department, which has the role of 'driving out' costs from the business.

The archive has not asked for much funding previously but wanted to secure funding for a heritage centre on site.

Important to demonstrate the value of the archives collection to the business. Show them the value and verify the value of the collection through external accreditation. This identified the collection's usage potential and an external appetite for the collection.

This could be translated into Boots' duty of care for a collection which held national significance.

Potential uses for the collection were identified:

- 'The past is by definition a success story', if you have weathered the storm and your business is still standing, convey this message to customers
- Unites culture and values
- Reinforces brand advocacy
- Builds on CSR credentials
- Engages business partners
- Informs strategy by drawing from past lessons learned

Have a clear vision

- Outline what you are trying to achieve

Ask the experts

- Bring the weight of consultancy to the decision
- Provide that reassurance

Consult with your peers

- Provide evidence of others doing similar things
- Shows that other businesses think it's a worthwhile investment

Show what 'good' looks like

Find a committed champion/influencer. Could be:

- CSR director
- Communications, marketing, HR, PR
- Finance and/or property
 - o Get all of these on board even if they are not the champion

External grants available from:

- Heritage Lottery Fund – while they have a preference for funding charities will fund businesses if the benefits reach a wider community
- Arts Council England
- AHRC
- Research grants from universities – Warwick University completed Boots' funding proposal for them

- Leverhulme Trust
- Wellcome Trust
- Esmée Fairbairn Foundation
- ...amongst others

Format

- Bring the vision to life with images; make it memorable

Pitch perfect

- Appeal to the brand, company values
- Anticipate the questions they will ask and answer them in your proposal
- Know who your customers are
- Use models, examples and evidence
- Show the numbers (make sure they are accurate) – best case, worst case
- Present the whole picture
- Realistic aspirations

Susan Gentles and Amy Proctor Archivists, Standard Chartered Bank: ‘Windows on the World’ a partnership project with London Metropolitan Archives

The London Metropolitan Archive manages the archive for Standard Chartered Bank.

The two banks (Standard Bank and Chartered Bank) have a long history dating back to the 1800s and overseas to Africa, Australia, India and China.

In 2010, wanting to reduce financial overheads, the bank sought to ‘get rid of’ its archive and deposited its collection with the Guildhall Library.

Identifying that the, then current, staffing levels at the LMA could not look after the bank’s collection to sufficient standards, LMA sought funding from Standard Chartered to cover this cost.

Standard Chartered Bank has provided funding for a team of three archivists to work on the project for the two and a half years (soon to reach its conclusion). This team is based at LMA and catalogue records already housed at LMA as well as those which are currently held at the bank itself.

Securing the funding was relatively straightforward as the bank was keen to retain the collection and understood the benefits it could realise from doing so, but did not have the in-house skill set to do this.

Key to negotiating the agreement between the two parties was:

- A good relationship with the bank’s historian and the LMA
- Realistic objectives using benchmarked statistics, (although on reflection the LMA would have built in more ‘slack’ to the programme to cover unexpected staff absences and replacements)
- Encouraging stakeholders to participate in the process and keeping them informed of developments

LMA insisted that the records should be made available for public use after 40-45 years, as part of the agreement.

Good feedback from the bank, very happy with the project.

Adrian Steel Director, British Postal Museum & Archive - Opportunities (Let's Make Lots of Money)

We are all fundraisers - we just need to find people, find needs and meet those needs.

- Put the effort in, do the legwork
- Be intelligent and aim smart
- Look for power, influence, money and endorsement
- Watch the media, twitter topicality and make yourself topical all the time
- Use the champions in your organisation – don't just have them
- Use your friends
- Politicians know people – get them involved; MPs, councillors, mayor etc

What sort of people to ask for money?

- Trusts, foundations, corporates, individuals
 - o Have the infrastructure ready to manage contacts, need a good database
 - o Share your contacts
- Consider the usual suspects, they can always point you to other sources
- Funding pots – approach those with common mindsets
- Corporates/ individuals are often less restricted but you need to remain competitive

Finding needs

- Social/educational?
- Recognition?
- Passion of an individual?
- Contacts?
- Influence?
- Good CSR?
- Good home for their money?

Identify your own needs, collections needs, parent organisations and suppliers...needs can change over time.

BPMA has secured funding for a new home for the BPMA museum which will open in 2016.

The new location promises to 'meet needs:'

- 'This building will be transformed into whatever you want it to be'
- Show how what you are doing meets needs
- Show how the funder's money has made a difference

Promise, demonstrate and provide good reliable delivery for their investment

- Smallest to largest donors should get regular reports on progress
- Emails, newsletters

Other sources of funding

- 'Toplots' – heritage experiences, bid online 'people will pay fortunes to ride on things other people aren't allowed to ride on.'
- Charitable trading, reproductions
- Donation boxes
- Legacies – depends on good relationships to secure these
- ACE, PRISM, AIM, AHRC... and others
- Barclays, Garfield Weston, British Philatelic Trust (stamp enthusiasts), DCMS Wolfson

Stacy Capner, Business Archives Development Officer for Wales, Richard Burton Archives, Swansea University: Forging Links - a collaborative approach to funding for business archives in Wales

There is no corporate archive in Wales, no central deposit for business archiving. All business archives have previously found their way to local records offices.

Powering the World is an ARCW project, funded by the Pilgrim Trust under the National Cataloguing Grants Programme and CyMAL, to highlight Wales' industrial past by cataloguing some of its valuable business collections including:

- Inigo Jones Ltd, Groeslon, and
- Davies Brothers, Slate Merchants, Porthmadog
- Jonathan Davies, Porthmadog, Papers, the slate merchant, quarry owner and J.P.
- Wrexham Lager Beer Co. Ltd,
- Coppack Bros and Co., Connah's Quay, ship-owning and chandlery business (Flintshire Record Office);
- Waddle Engineering and Fan Co. Ltd, Llanelli,

Lessons Learned:

Funding should be suited to what you want to do

Pre-application phase is as important as the application itself.

Talking to people is crucial, especially when working in collaboration. Ensure partners have the ability and resources to fulfil commitment. Think about how the project will be managed and funding channelled.

Promote 'matched funding' between supporters

Non-monetary support is also useful. People with an interest in the project can be beneficial, don't just go for the 'big names'.

Timing is key – keep the momentum of the project going

Melinda Haunton Programme Manager (Accreditation), The National Archives: Finding funding - the case for business archives

Business Archives can be corporate, trusts or public sector holdings

The National Archives applies for grants but is also a grant funder.

Business Archives can obtain funding from:

- Earned Income

- Private – trusts/foundations, individuals, companies
- Public – lottery, statutory bodies

Different motivations for funding: emotional, financial, social, political – think about which apply, this should influence the way that you approach the application

Competitive funding landscape – build relationship with fundraiser (even if they say no). Find out their motivations, what type of project might appeal? What's the best way to approach?

Be strategic; believe in your value; understand potential funders; persevere.

If get rejection, find out why, reshape application and reapply.

When applying for funding from the archive's parent body, think 'viability and visibility':

- If it detracts from core mission, it is not supporting the service
- Archives is a key good news story supplier
- Clear mission, linked to their aims and purposes.