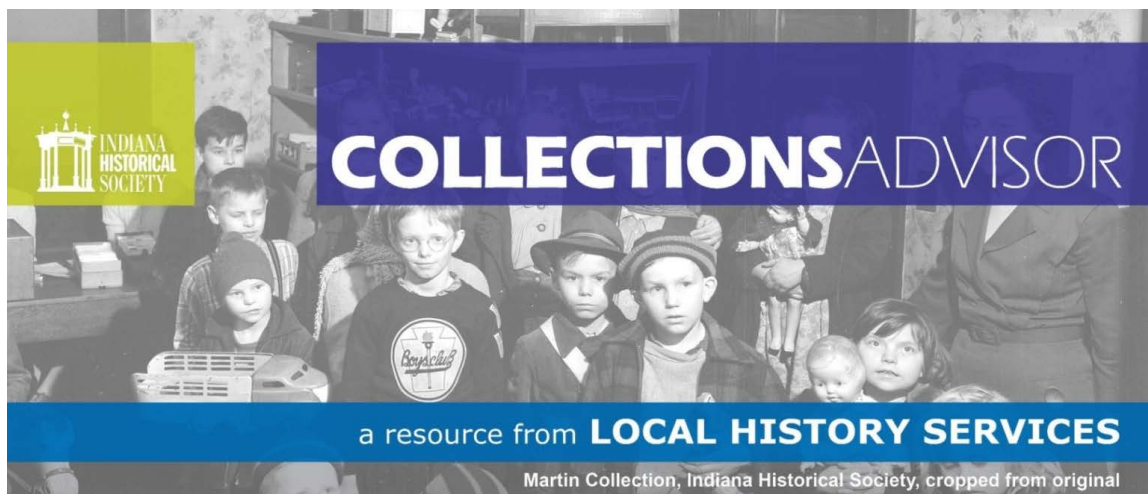


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Strategic Fundraising for Collections Care Begins with a Plan

by Jamie Simek, fundraising educator, [Indiana Historical Society](#)

From heat, humidity and insect infestations to overstuffed cardboard boxes and incomplete inventories, possible threats to historic collections are daunting and to-do lists are long and expensive. Time and again, small historical organizations find themselves wondering how to budget (and attract) resources for collections care. According to the Hoosier Heritage Alliance [Connecting to Collections survey report](#), approximately 75 percent of organizations surveyed have preservation of the collection as part of their mission, but only 34 percent have funds budgeted for collections care. In other words, even when collections care has been identified as critical to mission, it often does not receive the attention or funding necessary to ensure an appropriate level of care and access.

As President Dwight D. Eisenhower noted, we are often “compelled to give our first attention to the urgent present rather than to the important future.” Emergent “front of house” issues and disasters *du jour* quickly consume our resources – particularly those of time and money – at the expense of collections stewardship, which is usually a behind-the-scenes activity. This often leads to reactive (versus strategic) fundraising. According to [Heritage Preservation’s report](#), “Some institutions allow funding to drive their programs and priorities. Instead, the programs and priorities should drive fundraising.” This underscores the need to plan for the important future of your collection, and for your organization as a whole. Even if you are not ready for a strategic plan, your staff, board and volunteers can still plan strategically. By integrating even the most basic plans for collections care, fundraising and interpretation into an institutional plan, you can help ensure that your organization remains sustainable and relevant.

In order to attract funders to your mission and goals – including collections care – you must provide a clear,



Indianapolis War Chest on Monument Circle, 1918. W.H. Bass Photo Company Collection, Indiana Historical Society

strategic vision for the future of your organization. By putting pen to paper, you can clarify what is important to your organization, set reasonable goals, prioritize important collections care projects and develop strategies to match donor interests with your opportunities. There are many resources from trusted sources like the [American Alliance of Museums](#) and the [American Association for State and Local History](#), as well as local history [field services experts](#) and nonprofit consultants, available to help you with all aspects of your institutional plan. As you consider your needs and start thinking strategically about how to move forward, remember these important aspects of the planning process:

- 1. Review your organization's mission and goals.** Your mission should clearly and concisely state your organization's reason for existing. Does it speak to the work you do? To the people you serve? Do you have big picture goals that support your mission?
- 2. Know your collection.** For many historical organizations, their collections are their biggest assets. What are the strengths and weaknesses of your collection and/or your collections care process? What opportunities could your collection provide? How can you address any threats to it?
- 3. Identify priority projects in line with mission and goals.** Planning is a continual process of prioritization and assessment. What projects are critical to your mission? How can you address the urgent while still planning for the important?
- 4. Define project objectives.** Be specific about what you want to accomplish with your limited resources. What outcomes will put you on the path towards achieving your goals and fulfilling your mission?
- 5. Identify tactics and activities.** Your activities will consume the bulk of your time and you want to use it well. What tactics can you employ to use your resources strategically? What activities will help you achieve your desired outcomes?
- 6. Determine project cost in terms of time, money and people.** You are seeking a balance between your needs and resources. What resources are essential in order to meet your objectives? What can you provide from within your organization? What will you need to secure from other sources?
- 7. Take stock of potential funding sources.** Diverse funding sources contribute to organizational stability. How do you generate income now? What would you need to do to secure other sources of income through fundraising or earned-income strategies?
- 8. Show and tell your story.** At the heart of every case for support is the story. [What is your organization's story?](#) Why is it important and why does it make you worthy of outside support?

Collections care is often overwhelming. Likewise, fundraising is often overwhelming. However, both are made significantly more manageable when they become clear priorities in organizational planning.

Resources

[American Alliance of Museums, Alliance Reference Guide:](#)

[Developing an Institutional Plan](#)

[American Alliance of Museums, Core Documents](#)

[AASLH Technical Leaflet #242: DIY Strategic Planning for Small Museums](#)

[Connecting to Collections Care Online Community: Fundraising for Collections Care](#)

[Heritage Preservation: Capitalize on Collections Care \(slides\)](#)

[Heritage Preservation: Capitalize on Collections Care to Increase Support \(report\)](#)

[Indiana Historical Society: Hoosier Heritage Alliance](#)

[Museums Australia: Strategic Planning Manual](#)

Available in the Indiana Historical Society's [Lending Resource Center](#):

- The Conservation Assessment: A Tool for Planning Implementing and Fundraising
- Strategic Planning Workbook for Nonprofits
- The Manual of Museum Planning
- The Fundraising Planner: A Working Model for Raising the Dollars You Need

Search the LRC database using terms such as: strategic plan, fundraising, campaign



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