Donor Strategy is helping the Holburne Museum to achieve its fundraising targets for its exciting new capital development

With its roots in the eighteenth century, the Holburne Museum is building a leading visual arts venue and centre for creative learning in the south west.

A major development programme at Holburne will see the existing building completely restored and refurbished and a striking new extension constructed.

Fundraising Manager Marnie Whiting explains how Donor Strategy is helping the Museum to achieve its fundraising targets for the development.

An independent institution with charitable status, the Holburne Museum in Great Pulteney Street, Bath, houses a collection offine and decorative arts, built around the collection assembled by Sir William Holburne in the nineteenth century. A university museum, the Holburne has a strong educational programme, offering courses, events and creative art workshops to students and art-lovers of all ages.

Business challenge

While the Museum's capital development programme is supported by a grant from the Heritage Lottery Fund, its appeal target is a challenging £13.8 million. This makes it a demanding period for the Museum's staff, yet the scope of the development work means that they have had to relocate temporarily to offices across Bath's city centre. Interdepartmental communication has become more difficult, putting increased importance on being able to share information securely online.

Solution deployed

The Holburne Museum adopted Donor Strategy to assist its fundraising strategy. Previously, contact details, for example those of its patrons, were kept on spreadsheets and they would be mailed details about events using label reports in Microsoft Word.

The planned major development brought the need for a more focused approach and an IT platform capable of supporting fundraising. The Museum sought a system with strong relationship management functionality from a provider established in the arts sector. Word-of-mouth endorsement made Donor Strategy a strong candidate to take the Museum's fundraising forward.

Marnie Whiting joined the Museum in the same year as Fundraising Manager. She remembers, "There were many years' worth of boxes and filing cabinets, holding records that needed to

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Donor Strategy helping to achieve its targets

be entered onto the database. Quite a task! However, it did have the advantage of enabling me to set up data records from scratch in a consistent way."

Benefits achieved

The Museum's fundraising strategy has come a long way since then. Success in attracting significant individual donations and grants from trusts mean that 'only' around £2 million remains to be raised. Marnie acknowledges that while it might be possible to achieve this with a manual system, it is far easier with a database supporting the large amount of work and activities needed for campaigns.

The Museum fundraises across the spectrum. Marnie is able to monitor grant applications, putting submitted applications onto the system, recording all subsequent correspondence and how much is received. At the opposite end of the scale, she finds keeping in touch with individual donors is straightforward, "Donor Strategy increases our efficiency in communicating with supporters. For example, I can invite them to events or send out regular reports on the building project to groups of supporters very easily, using a single set of records, rather than having to access and update multiple databases. It all makes life a lot simpler, especially when you have a lot on your plate as we have at the moment." Donor Strategy helps the Museum to monitor its web of relationships with supporters. Marnie explains, "Previously, Museum staff could and did find that they were contacting one person for different reasons. A potential donor with an interest in conservation might have been talking to our curators at the same time as they were being approached by the Director about making a sizeable donation."

The relationship is now more co-ordinated: "Quite simply, we now have a clear record of the different relationships that exist between staff and supporters. Whereas this information used to be stashed away in many personal systems, it is now accessible to all and we're not dependent on any single individual. This means we can all have effective conversations with supporters that draw on all the knowledge we have acquired and I can advise our Chairman or Director on who the best person is within our team to make an approach to a potential donor."

Marnie adds that the database goes from strength to strength with daily usage: "We now have a good picture of someone's giving history over several years - more than a decade in some cases - whereas previously we would have relied on paper records and people's memories."

With Museum staff spread across the city at present, Marnie values the way Donor Strategy helps her to liaise with colleagues in Finance, "Through Donor Strategy, we can co-ordinate with Finance to ensure we are aware of all donations received in the last week or month. It really brings to light anything that might have been missed. This is especially important at the moment, when we're working out of different locations and have less direct contact with other departments - it helps us to keep on top of everything. This capability has a direct impact on long-term relationship with donors: "With Donor Strategy, we can check who has recently donated so that we acknowledge contributions and send our thanks in a timely fashion."

All letters and Gift Aid forms are scanned to give everyone a complete, shared view of a supporter. Fundraising and Finance use the same nominal codes, so quarterly reports to the board contain an up-to-date, accurate record of the contributions received. Commenting on

Donor Strategy helping to achieve its targets

the support Advanced NFP has provided during this busy period, Marnie notes, "They have been extremely helpful in resolving any technical issues along the way." Donor Strategy still supports fundraising now

the refurbished Museum has openend its door once again. The Holburne needs an annual fundraising income of about £350,000 to cover its operating costs. Marnie says, "Donor Strategy is great and, once we're back to normal, I want to extend its value across the organisation and encourage more people to use it. I can see there's scope to become even more targeted in our communications. As we develop a programme of repeat events, I'm looking forward to being able to invite supporters to attend those which reflect their artistic tastes and interests."

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