

# New Stream

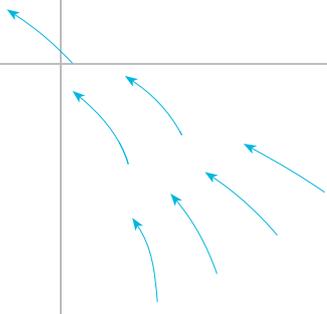
A project operated  
by Business to Arts

*Conversation*

*ing Events*



REVIEW 2009-10 (YEAR 1)

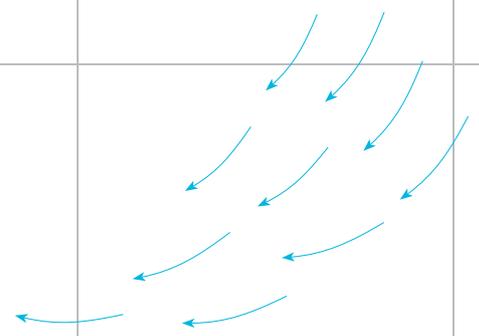


*Investment*

20

9

*Cuts*



*Smart Ideas*



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# New Stream

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# New Stream

## Executive Summary

This report analyses the first year of operation of the *New Stream* project operated by Business to Arts and supported by Bank of America Merrill Lynch with additional investment from *Business to Arts* corporate members and the Department of Tourism, Culture and Sport.

The assessment and report was compiled by Alf Desire of Delcer Consulting in November 2010. Qualitative research was undertaken on each of the project's first three strands – the Brown Bag Briefing Sessions, For Impact Training and the Development Managers' Forum.

Since the programme began, 28 participating organisations have fundraised over €1 Million of income attributed to their participation in and skills/theory learned from the *New Stream* programme.

An overwhelming majority of the participants believed that the briefing sessions, fundraising training and networking forums were fit for purpose and added to their fundraising skill set.

Case study data highlighted that this was among the best training that fundraising professionals/those with a significant fundraising responsibility had ever received.

The developing network of arts fundraisers is the first of its kind in Ireland and the potential model for other sectors.

60% of For Impact participants who responded to the survey indicated that they were novices at the outset of the programme. 80% of all For Impact participants now believe themselves to be intermediate or expert fundraisers.

Recommendations to enhance the programme include the development and maintenance of the online information and learning resource store, the use of webinars, mentoring and more networking opportunities.

Process recommendations included the publishing of an annual calendar of events, quarterly programme reviews and ensuring that outcomes and information from one *New Stream* element is fed back into another.

# New Stream

## Introduction

by Stuart McLaughlin – Chief Executive,  
*Business to Arts*

At the outset of the *New Stream* project *Business to Arts* made two key commitments: to undertake a full annual evaluation of the delivery and outcomes of the training provided, and to maintain flexibility in the project that would allow *New Stream* to adapt to the feedback of our stakeholders and the funding environment of the time.

This report, carried out by an independent third party and reviewed and supported by input from University College Dublin, represents the evaluation of the first year of delivery and the results are both encouraging in the context of participation, content and outcomes and valuable in terms of informing the future direction of *New Stream*.

The research shows that *New Stream* participants have not only responded positively in terms of the relevance of the training and support provided, but also that the 28 organisations who shared data on funds raised (which they attribute directly to skills developed via *New Stream*) have achieved a return of over €1m, representing 10 times the initial investment made by Bank of America Merrill Lynch in the project.

This financial return, together with the reported increase in skill levels and knowledge, represent an important step in the direction of enabling the cultural sector to develop greater fundraising capacity and support the diversification of funding sources; a core objective of the *New Stream* project.

Naturally there are areas for improvement highlighted by those involved in the project and such feedback is critical in maintaining

the high standards of the first year of *New Stream*. In response to these comments and observations *Business to Arts* will be meeting with key stakeholders to agree the appropriate delivery model for the second year of the project.

It is anticipated that these consultations will lead to developments which will include, but are not limited to, greater facilitation of networking at group sessions, delivery of selected content online and greater focus on ongoing development of those who have participated in year one of *New Stream*.

With regard to our ‘alumni’ from the first year of the project a key observation from *Business to Arts* to date has been the challenge of supporting the mix of organisations that have varying levels of capacity and intent with regard to fundraising. In planning the second year of the project we will develop an approach that seeks to address the differing challenges of participants.

For the first time in arts fundraising, *New Stream* has provided a structure around professional development. The evidence from the first year of the programme, coupled with a commitment to investing in talent, leads us to believe that a continued focus will reap substantial rewards in the long term.

*New Stream* is funded by Bank of America Merrill Lynch and by the continued support of *Business to Arts* corporate members and the Department of Tourism, Culture & Sport. Without the support of these organisations we would have been unable to create the significant impact that has been achieved in the first year of the project and we acknowledge the role of each of our supporters in enabling us to deliver these outcomes.

# New Stream

## Aims and Methodology

### Aims

- To provide a review of *New Stream* activity to date
- To make recommendations on process, delivery and content based on collated primary/secondary-based research
- To provide case studies evidencing the value of the *New Stream* programme
- To make recommendations on implementing ongoing feedback and review systems for the project

### Methodology

The data for the *New Stream* review was collected in two ways, firstly via an online questionnaire and secondly through telephone interviews.

The scope of the review covered 13 events (6 Brown Bag Briefing sessions, 4 Development Managers' Forums and 3 For Impact training sessions) that ran from 15 September 2009 to 21 October 2010.

As respondents may have attended one, two or all of the *New Stream* events over the year, the prospect of filling in three separate questionnaires based on event type could have been prohibitive. Also, as responses were not sought immediately after each session, and some of these were over a year ago, respondents may have had some difficulty in recalling content.

With this in mind *New Stream* programme attendees were mailed a link to the online questionnaire (hosted on SurveyMonkey) and were given an explanation of each event/training type, along with event titles/dates/locations.

The single questionnaire was developed with skip-logic so that respondents only answered questions relevant to the particular *New Stream* element they participated in. The question types were a mixture of Likert scale evaluation and open-ended.

108 people who attended a *New Stream* session were contacted to take part in the review and from that, 50 (46%) completed part/all of the online questionnaire.

The telephone interviews sought to provide further in-depth insight into the overall value of the *New Stream* programme to individual arts organisations. To ensure that appropriate breadth was covered, organisations of different size, location and art form were targeted.

PhotoIreland Festival, Bealtaine Festival, Abbey Theatre, Ulster Bank Dublin Theatre Festival, Klawitter Theatre Group, Siamsa Tíre, Helium and Burren College of Art all responded to the request and participated in telephone interviews for the review.

# New Stream

## Calendar of Events 2009/10

### Date, Event & Location

15/09/2009

Friends & Membership Schemes  
– Chester Beatty Library, D2  
*Development Managers' Forum*

27/11/2009

Understanding How Brands Leverage their Arts  
Sponsorships – National Concert Hall, D2  
*Brown Bag Briefing*

07/12/2009

Managing Relationships with your Supporters –  
Business to Arts, D2  
*Development Managers' Forum*

14–15/1/2010

For Impact Fundraising Training: Part 1,  
The First 100 Days – Camden Court Hotel, D2  
*For Impact Training*

04/02/2010

Contracts 101 – Mason Hayes+Curran, D4  
*Brown Bag Briefing*

15/04/2010

US Family Philanthropy; Strategic Giving and  
Women as Donors – AIB Bank Centre, D4  
*Development Managers' Forum*

28/04/2010

Google Grants Workshop – Google EMEA, D4  
*Brown Bag Briefing*

04/05/2010

Preparing & Making the Pitch –  
Deloitte Academy, D2  
*Brown Bag Briefing*

10/05/2010

For Impact Introduction to Fundraising –  
National Concert Hall, D2  
*For Impact Training (Intro)*

11–12/05/2010

For Impact Fundraising Training: Part 2, The  
Next 1000 Days - Irish Life & Permanent, D1  
*For Impact Training*

21/09/2010

Data Control & Compliance – Boston College, D2  
*Brown Bag Briefing*

07/10/2010

Cultural Branding - What Next? – Royal  
Hibernian Academy, D2  
*Brown Bag Briefing*

21/10/2010

The Fundraising Potential in Your Database –  
Brooks Hotel, D2  
*Development Managers' Forum*

### Event Types

#### *Brown Bag Briefing Sessions:*

Run by Industry experts, these sessions are a regular series of short briefings that target specific areas of interest to those working in the cultural sector.

#### *For Impact Training:*

Fundraising skills development for individuals and their organisations.

#### *Development Managers' Forum:*

A collection of invited fundraising professionals (or those with a significant fundraising responsibility) from the cultural sector. The forum is a platform for discussing key topics and for collaborative networking.

# New Stream

## Overview of Participants

In total, 111 people engaged in one or more *New Stream* sessions in year one. 108 people who attended a session were contacted to take part in the review. 3 participants no longer work for the organisation they attended on behalf of. The geographic and artform analysis of all participants is below.

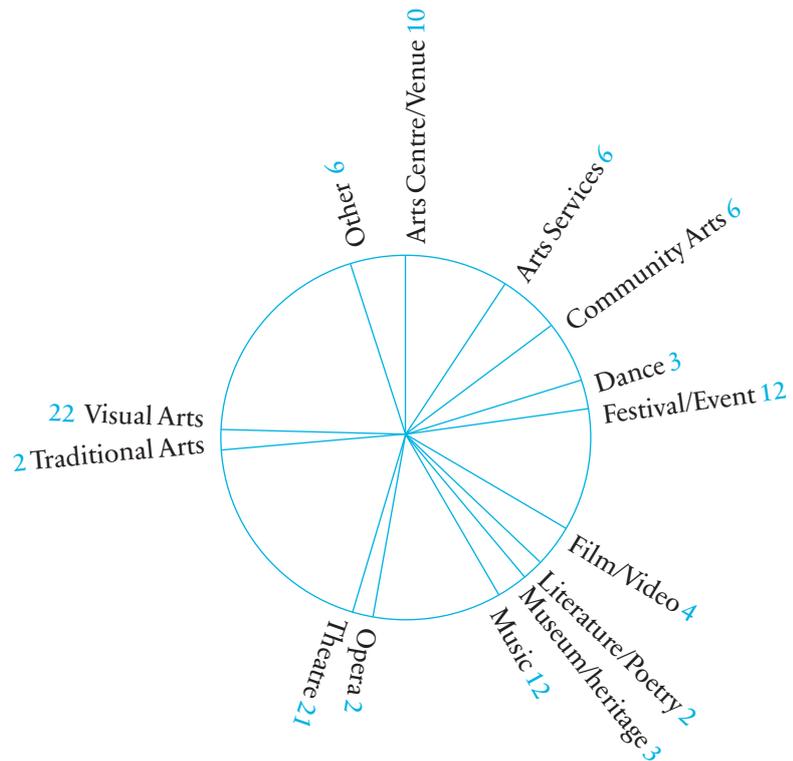
### Geographic Analysis of Participants

The majority of participants (66%) were based in Dublin. A detailed geographic analysis of participants by county is below.

#### County Number of Participants

Clare	2
Cork	3
Donegal	4
Dublin	73
Galway	5
Kerry	3
Kildare	4
Kilkenny	5
Louth	3
Roscommon	1
Sligo	1
Westmeath	1
Wexford	3
Wicklow	3

### Artform Analysis of Participants



# New Stream

## Review of Brown Bag Briefing Sessions (BBBS)

Over the course of the year, there were 115 attendees at 6 BBBS – averaging 19 per session. In the questionnaire, 23 of 50 respondents answered questions relating to these sessions.

80% of all respondents either agreed or strongly agreed with the statement that the BBBS were of great use to them.

The key reasons given for attending these sessions were:

- To gain and/or widen knowledge of the subjects covered
- Further develop business acumen and insight
- To understand the corporate sponsor's perspective
- Networking

77% of all respondents agreed/strongly agreed that the BBBS format was fit for purpose. Of the responses that were undecided (17%) and those that disagreed (6%), there were a few areas for improvement suggested, namely:

- Make them less of a briefing, more a conversational workshop-styled session
- Greater networking opportunities within the audience – and knowledge of who is present
- Make presentation materials/notes available

## Review of For Impact Training (FI)

There were 3 For Impact sessions over the course of the year: the full 2+2 day training held in January and May (including 100 days of support) and an introductory 1 day session also held in May. In total there were 72 attendees. 56% (28) of those completing the questionnaire answered questions relating to these training sessions.

In response to the question about attendee fundraising experience, 60% of all respondents were novices.

The following comments relate to the key aims of the FI training:

- 93% of all respondents believed that as a result of FI training they had improved their understanding of how to build a successful fundraising campaign
- 96% had developed a broader entrepreneurial fundraising mindset
- 93% were more able to communicate to others the value of fundraising within their organisation
- 86% were more confident in developing an internal/external fundraising sales pitch

Following the FI training, the majority of those who attended (77%) developed/ informed an existing fundraising strategy. In addition to the new fundraising skills and behaviours learned by participants, further outcomes are listed below:

- Refined focus of the fundraising team
- Improved fundraising mindset in organisation
- Informed, as well as instilled confidence and positive thinking in organisation
- Developed a wider business plan

€1,044,000 of fundraised income reported by participants is attributed to the use and application of the For Impact model. As a result of the training, the level of expertise of participants has shifted with over 50% now at intermediate level – and a further 30% at skilled or expert level.

For those who were unable to employ the FI model to date, the following reasons were listed:

- Lack of time
- Lack of resources
- Lack of Boardroom buy-in / change in management personnel
- Other organisational priorities

Every participant in FI training agreed that the format of the sessions were fit for purpose – with 46% strongly agreeing. The key points raised as to why the training worked well were:

- The discussion and networking opportunities with those that are in the same sector and facing the same issues
- The presentation style, materials and model used
- The support available outside of the training sessions
- The collective change in fundraising mind-set of those being trained

# New Stream

## Review of Development Managers' Forum (DMF)

There have been 4 Development Managers' Forums in this *New Stream* year. There were 61 attendees at these 4 forum events. 18 of the 50 survey respondents had participated in DMF events. The sample size of those attending individual sessions however was small (10, 12, 5 & 7 respectively).

74% of attendees agreed/strongly agreed that the DMF were of great use to them. 21% neither agreed nor disagreed and the remaining 5% disagreed.

On the question whether the DMF were fit for purpose, 88% agreed that it was with 6 percent neither agreeing nor disagreeing and 6% disagreeing.

The key things mentioned when recalling what worked well at the DMF were:

- Good environment for networking
- The feeling of developing arts fundraising community
- Sharing and confirming best practice

Areas for improvement/enhancement noted included:

- Participants need to commit to all/most of the sessions to maintain its value
- Include a defined period of time whereby forum members can talk between themselves more
- Smaller working groups (by org size/art form/type)
- Matchmaking opportunities

Future topics for discussion could include:

- Diversifying income
- Working with Boards/Company engagement with fundraising
- Fundraising in a recession
- New media
- Managing sponsorships
- More on Friends/Membership schemes
- Benchmarking
- International fundraising
- Merchandising
- Time management
- Leadership models
- CRM systems
- Marketing

# New Stream

## Summary of Feedback

### Appraisal of *New Stream* Outcomes

In terms of satisfying the primary objective of *New Stream*...

*‘...to strengthen the skills of the Irish cultural sector to generate new funding streams from non-public sources more effectively, an increasingly important factor to ensure our rich Irish cultural heritage thrives into the future.’*

...the programme has been a qualified success.

In just over a year since its start, and 6 months since fundraising training was completed, participating organisations have directly attributed over €1 million of fundraised income to the *New Stream* programme.

An overwhelming majority of attendees believed that the briefing sessions, fundraising training and networking forums were fit for purpose and added to their fundraising skill set.

The positive shift in skill levels is directly attributed to the *New Stream* programme.

Case study data highlighted that this was amongst some of the best training that fundraising professionals/those with a significant fundraising responsibility had ever received.

The developing network of arts fundraisers is the first of its kind in Ireland and the potential model for other sectors.

### Issues Raised

#### Brown Bag Briefing Sessions

- Clarity on content prior to attendance – also who should and shouldn't attend
- No handouts
- No networking opportunity
- Dublin-based – no regional Brown Bag Briefings

#### For Impact Training

- Follow-up activity (mentoring, managing sponsorships, pre-visit preparation) requested
- Ability to implement For Impact model hindered by the inability of smaller arts organisations to allocate time and resource to fundraising
- Boardroom/management buy-in difficult for some organisations
- Segmentation within the training
- Database resource required
- Reporting (review of non/successful campaigns) to be fed back

#### Development Managers' Forum

- Greater opportunity for networking
- Event dates (awareness of)
- Segmentation

# New Stream

## External Observations

By Pat Cooke – Director, MA in Cultural Policy and Arts Management, UCD

- My first point is that the largely positive results of the survey read credibly and are a credit to the quality of the initiative taken by *Business to Arts* in setting up and running such an intensive programme giving arts practitioners access to such valuable skills.
- The €1+ million funds raised during the first year and directly attributed to *New Stream* is on the face of it impressive, but what does it really mean? Does it represent under or over achievement? In other words, how could it operate as a performance indicator? Clearly, as this is only a first-year outcome, it offers very little insight on this basis, but perhaps closer analysis of how it is composed, augmented by a similar analysis of the coming year's outcome, might help to build robust and credible headline performance targets for succeeding years.
- The point that comes across most strongly to me from the report is the perceived importance and centrality of networking to the process. Those participating in the Brown Bag sessions cited “greater networking opportunities within the audience – and knowledge of who is present” as an area for improvement. This is picked up where a recommendation on ‘Consider Review of Format’ states “Ensure that these sessions are facilitated as opposed to being speaker led. Provide ample time for group discussion and networking. Record and cascade outcomes”. It is reinforced ‘Promote Networking Opportunities’.
- In this context it might be useful to take a closer look at the structure of the sessions. Is a proper balance struck between ‘guru’ style presentation and active learning scenarios which not only allow attendees to learn from each other but to deepen and enrich networks while doing so?
- Among the reasons listed for those who were unable to employ the FI model to date was boardroom buy-in /change in management personnel. Boardroom buy-in seems a critical factor to me. In running the Heritage Council's Museum Standards Programme (which I helped design and on which I now work as an assessor) we tried to find a way of structuring this into the assessment process. Thus, when we do our assessments of museums, we make clear our expectation that we will be met during our visits by the manager and at least one member of the board, and we require that all key standards are endorsed by means of minutes signed-off by the board. This may not be possible in the context of *New Stream*, but ways of incentivising board-member participation would bear some analysis. For example, could the webinars facilitate greater involvement by board members? Of course (taking the American view) the challenge question is: if you are not willing to acquire these skills, what are you contributing by your presence on the board in the first place? Is it too much for *New Stream* to put out the unequivocal message that every board ought to have at least one member who is familiar with (and indeed committed to exercising) fundraising skills?

### Some more general points...

- While reviewing with *Business to Arts* and Alf Desire, we had a wide-ranging discussion of factors relating to the overall ‘ecology’ of *New Stream*. Though *New Stream* is systematically focused on fundraising as the main form of expertise, a wider view of organisational culture may help to better focus the learning-experience and lead to more effective outcomes. Above all, there needs to be a robust discussion around organisational mission and values. There also needs to be a thorough examination of the visitor/audience experience, possibly involving some exit surveys. Many arts organisations may be somewhat complacent in areas such as reception and training of front-of-house staff. Enhanced performance in such areas is critical to enhancing the overall performance of the organisation in a way that will satisfy funders and enhance the possibility of sustaining a relationship with a view towards multi-annual funding.
- In attending *New Stream*, the staff of arts organisations are acquiring a valuable, and transferable, set of skills in fundraising. Inevitably, there will be those who are good at it and those who aren’t. Those who are very good may prove difficult to retain, and may even be poached by other organisations. It may be worth, therefore, considering putting in place some incentives both to motivate and retain such staff. Modest commission, linked to robust funding targets, may be worth considering as a valid mechanism, given the intrinsic and transparently performance-related nature of fundraising.
- Fundraising takes place in a competitive environment with wide variability in the talents and skills of individual fundraisers and organisations. Some will succeed magnificently, others will meet modest income-generation targets, and others will fail. Given also the extremely harsh economic background the Irish arts world now faces, it is likely that some arts organisations will not survive—even those whose relatively successful efforts at fundraising may prove insufficient to stave off insolvency. It is worth considering how expectations (of income and performance) should be managed in this context, and how such expectation-management might be built into the way the various strands of *New Stream* are delivered.
- Part of the overall ecology of arts organisations is their capacity to engender goodwill towards their ethically robust and non-profit-making goals. There is a danger that if organisations deploy the skills acquired through *New Stream* solely and exclusively in terms of fundraising goals, other benefit-in-kind type opportunities may be missed. This can take the form of materials (e.g. rent-free lighting equipment supplied to a theatre by a lighting company) or skills offered on a voluntary basis (painting, plastering, carpentering, for example). The broader question of what can your organisation do to help my organisation, has a wider set of answers than a purely cash-based approach entails, and in some cases a mix of funds plus other benefits-in-kind might prove a more valuable one. Good negotiating skills, such as those engendered through *New Stream*, should take account of as many imaginative opportunities of supporting an arts organisation as may be feasible.

# New Stream

## Recommendations

### Brown Bag Briefing Sessions

- *Keep the format the same.* A big part of the success of these sessions is that they are succinct. Adding a networking element to the event would confuse it with the Development Managers' Forum. If *Business to Arts* provides each delegate with a list of attendees with their contact emails, the delegates can pursue further discussion outside of the session.
- *Consider webinar delivery for some of the sessions.* Will ensure the widest possible geographical reach can be achieved at a fraction of the cost of holding repeat events in multiple physical locations. Adobe Connect, Webex and GoTo offer good quality and cost-effective packages.
- *Provide a more descriptive event outline for every briefing session.* Make these available well in advance of and at the time of booking. Make clear who the event is best suited for. Offer opportunities for delegates to pose questions in advance. This will give the presenter a better idea of the levels of expertise in the room as well as stimulating the Q&A element of the session.
- *Ensure handouts are available after every event.* The nature of the notes written by attendees will differ greatly if they expect to receive event notes.
- *Make audio recordings of briefing sessions.* Keep them on an online repository – accessed through the *Business to Arts* website. Make available as a basic audio file or podcast. Convert existing video footage into audio if file sizes are too large and quality of footage variable.

- *Develop briefing sessions from areas suggested by BBBS participants.*

A “working with your board/senior management team to achieve fundraising goals” session should be included. Feedback from the For Impact training showed that senior level buy-in is a key element of a successful *fundraising campaign*.

### For Impact Training

- *Establish a follow-up programme to augment the For Impact training.* Feedback suggested that although the training was very good, there is still a requirement for on-going support as the For Impact model is being implemented. Consider the development of an online forum, mentoring meetings and regional workshops for those in need of additional support. Focus on preparation for the initial meeting with potential investors and managing/invigorating the relationship thereafter.
- *Ensure more Ireland-based /contextualised fundraising case-studies are used in future training sessions.* Use case-study data from this cohort of *New Stream* participants in future training events. Ensure that trainers provide contextualised examples in training from the Irish perspective.

### Development Managers' Forum

- *Consider review of format.* Ensure that these sessions are facilitated as opposed to being speaker-led. Provide ample time for group discussion and networking. Record and cascade outcomes. Development Managers can decide whether they want to lead in the development of further discussion with similar sized or type of organisation outside of the forum.

## Review Process

- *Ensure that event evaluation is undertaken immediately after each event – link this to the dissemination of the event notes.* The feedback data will be one of the programme's main measures of success. To ensure that event evaluation is completed, make event notes and other related resources available to participants only on the completion of a questionnaire. Upon completion, respondents can be directed from the online survey thank-you page to a page on the *Business to Arts* website that holds the information.
- *Ensure forum outcomes/resources are written up and cascaded to non-forum members.* Some topics (friends & membership schemes, philanthropy, CRM) came up as requests for briefing sessions although they had already run as forum topics.
- *Keep using an online collector for survey completion.* Makes for easier analysis and avoids duplication of effort with respect to data entry. Use set templates to capture feedback from each event type. Use for future assessment of the online information store (together with Google Analytics reports on user behaviour) and mentoring/workshop/ webinar activity.
- *Review all briefing, training and forum events quarterly.* May need to make mid-programme tweaks to ensure quality is maintained and participant needs/programme aims are being met.

## General

- *Look to develop board member/senior management information session.* Consider how *Business to Arts* can work with boards of cultural organisations to ensure they understand their responsibilities in terms of engaging in fundraising as a verified source of diversified income. Lack of time and changes in management structure were the most frequently quoted reasons for fundraising campaigns not starting. Some fundraisers are not getting buy-in from their boards. Consider dialogue with Department and/or Arts Council for support.
- *Produce a calendar of events.* A lot of feedback from all areas of the *New Stream* programme concerned the lack of available time to commit to training or briefing sessions. This would allow organisations time to plan their attendance well in advance. Full attendance at the Development Managers' Forum meetings is essential in terms of providing outcomes that are representative of different type, size and art-form.
- *Promote networking opportunities.* Events hosted by *Business to Arts* have been instrumental in developing Ireland's first arts fundraising community. It still has a part to play in guidance.
- *Develop an online repository of information accessible through the Business to Arts website.* Keep case study information on current arts sponsorships, recordings and supporting materials from BBBS and Development Managers' Forums, case studies on successful and failed sponsorships, listing of available sponsorships & funds.

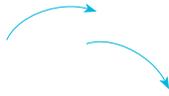
# New Stream

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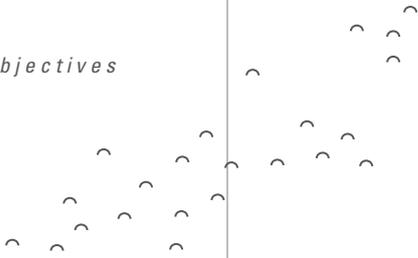


*Activities*

*Naturally Occur*



*Objectives*



*Eggs Benedict*



*Aims & Methodology*

