



# Income Generation in Libraries, Museums and Archives: Developing a Strategy for StoriPowys

Dissertation

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**Abstract**

This study concerns the investigation into income generation activity in public libraries, museums, and archives worldwide. Findings from the research will be used to inform an income generation strategy for StoriPowys, Powys County Council's cultural services.

A review of academic and professional literature identified successful income generation activities in cultural services worldwide, and explored themes of strategy, sustainability, and the impact of technology. Qualitative research, in the form of semi-structured interviews, was undertaken with a sample of ten participants, purposively selected from supporters of Powys' libraries and museums. Findings from an inductive, thematic analysis of interview transcripts were used to determine the appetite for, and feasibility of, implementing these fundraising initiatives in Powys.

Data analysis generated themes around the protection of core services, ownership, and engagement. Findings indicate that whilst participants were largely supportive of fundraising initiatives, delivery of core services and the service ethos should not be compromised in the process. A desire for public value creation and social return on investment were highlighted as drivers for donor investment, and an emphasis on benefits for communities and localities, cocreation, and collaboration. Additional findings concerned the broad audience base for StoriPowys, and the need to cater to the library customer as well as the museum visitor. A distinction too between the digital- and non-digital audience, as separate markets to target. The importance of communication was apparent, as were themes of transparency and accountability for funds.

Based on the findings, recommendations for the development of income generation strategy have been made, in which 4 key objectives have been identified. These include an investigation into options to ringfence earned income; development of a communications and marketing plan; development of a digital strategy; and a workforce development strategy.

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## **Introduction**

This research investigation attempts to contribute to existing research in the field of income generation activity in publicly run cultural services, specifically in relation to StoriPowys, Powys County Council's libraries, museums, and archives. It is intended that learning from this study will help inform an income generation strategy for these cultural services.

This chapter provides a background to StoriPowys, in the context of the financial challenges faced by the public sector and its impact on the sustainability of government-run cultural facilities. An overview of the research aims and objectives is presented, including the research questions that this study attempts to answer. A rationale for the study follows, which outlines the motivation for pursuing this investigation, reflecting on current difficulties facing cultural services budgets and workforce, against a backdrop of digital disruption and an unknown future. The chapter concludes with a brief overview of the research structure that follows.

## **Background**

Powys County Council's Cultural Services comprises of Library, Museum, Archive and Arts services for the Local Authority of Powys, mid Wales. Co-location of several of the county's libraries and museums have led to more collaborative working between the individual services, and collectively they are now branded as StoriPowys. 16 public libraries, 4 museums and one central archives and information management centre make up the total offer. Cultural Services management is composed of a small group of library, museum, and information management professionals, assisted by customer-facing service delivery team.

Powys is a rural county, geographically widespread with a relatively low population. Major towns and cities are not easily accessible, and residents depend on services and activities within their local communities. As a popular tourist destination, visitor numbers in Powys increase significantly over the summer months, and footfall in StoriPowys facilities, particularly museums, is higher at this time.

Funding for StoriPowys has decreased by more than half over the past decade. It follows a trend of decreasing financial support for publicly funded cultural organisations across the UK (Harvey, 2018) due to increasing financial pressures on local authorities and the need to divert funds to business-critical services such as social care and education. With further budget cuts likely in the wake of the COVID-19 pandemic, the future of StoriPowys in its current iteration is precarious. In 2020, management consultants were commissioned by Powys County Council to undertake an options appraisal on the feasibility of transferring its cultural services within the council to an alternative delivery model (ADM) that would sit outside the council (Red Quadrant, 2021. Unpublished – available on request). The outcome of the report concluded that that this was not a viable option at the time of publication, and that StoriPowys would need to diversify income streams to make an ADM feasible. Any income generation in StoriPowys thus far has largely been limited to the submission of grant-funding applications and low-level fundraising through ad-hoc book sales and donations pots, and the workforce is inexperienced in methods of fundraising beyond this. In response to this options appraisal report, StoriPowys has recognised that a strategy for income generation is essential for ensuring financial sustainability of its services.

## **Research Aim and Objectives**

As Powys staff lack knowledge and experience in income generation, the service must look to the wider world for inspiration to determine an appropriate income generation strategy. The purpose of this study is therefore to explore effective initiatives elsewhere, to identify relevant learning and research in the field and to develop a successful, sustainable strategy against a backdrop of digital disruption and post Covid-19 recovery. The aim and objectives are as follows:

**Aim:** to investigate how income generating activities in the cultural sector can be used to develop an income generation strategy for Powys County Council's cultural services.

**Research objectives:**

- To critically review the important literature surrounding income generation activities in cultural and non-profit sectors globally
- To conduct semi-structured interviews with consumers to determine customer opinion on the potential implementation of income generating activities proven successful worldwide.
- To develop an income generation strategy for StoriPowys and roadmap for sustainability.

## **Research Questions**

To meet the objectives, the following research questions have been posed:

1. What are the areas of income generation (e.g., legacy, corporate fundraising, commercial activity) that have proven most successful in local government and not for profit organisations globally?
2. What strategies are implemented by local government and not for profit organisations that fundraise successfully?
3. How are new technologies altering the fundraising landscape?
4. How sustainable are these successful models?
5. What is the appetite for, and feasibility of, implementing these successful initiatives in Powys?

## **Rationale**

Detailed information for museum and library professionals in Wales is difficult to find. A search of the Welsh Museums Federation website ([welshmuseumsfederation.org](http://welshmuseumsfederation.org)) fails to generate any literature on the subject, and neither library nor archives services in Wales have online resources for staff, aside from policy and regulatory guidance provided by Welsh Government. Looking more broadly within the UK, the National Archives website provides guidance around income generation in archives services (National Archives, 2019), including some useful case studies, but it exists primarily as a how-to guide for public sector archives. Libraries Connected, the national advocate for public libraries in the UK, has launched a Future Funding programme, to help library services develop and diversify income generation strategies, but training is currently available only to libraries in England and learning

from the programme has yet to be shared (Libraries Connected, 2022). The most comprehensive research to date can be found in a Locality report on income generation activities in UK public libraries (2015), in which findings revealed a disparity between potential income generating activities and evidence of the success of such activities, leaving library services with little proof that such routes to financial sustainability can be assured. Meaningful learning for StoriPowys will require looking further afield to similar organisations beyond the UK, to investigate whether success stories elsewhere can translate to rural mid Wales. It is hoped that a Wales perspective will contribute to improvements in strategy development.

In academic research, studies point to a significant disconnect between research and practice in the field of fundraising (Williams, 2016) and more work is needed to determine factors that influence charitable giving and the success of fundraising campaigns. The Charities Aid Foundation's Charity Landscape 2022 report (CAF, 2022) points to the changing fundraising landscape, and an increasing reliance on digital channels for successful fundraising campaigns. Online giving; social media campaigns; and crowdfunding are relatively new channels for raising funds and further investigation is needed to build a picture of what does and doesn't work, to inform a StoriPowys strategy going forward. Bhati & McDonnell (2020) point to a lack of academic research concerning the use of social media in fundraising, asserting that much investigation to date has focused on the general role of social media in consumer engagement, rather than its contribution to fundraising success. A 2021 benchmark report (Blackbaud, 2021) of UK charities acknowledges a rapid increase in adoption of digital tools for fundraising during the Covid-19 pandemic and the need for organisations to be digitally mature to keep pace with changing technologies. It is intended that learning from this study will contribute a cultural

sector perspective to emerging academic research on the use of digital tools for income generation.

## **Research Structure**

Chapter 2 presents a review of the literature, which includes an exploration of case studies as well as academic and professional research to determine which avenues of income generating activity could be adapted to a Powys setting. Discussion focuses on some key areas of fundraising including corporate sponsorship, commercial activity, membership programmes and development trusts. Digital innovation in fundraising including crowdfunding will is reviewed, as is an exploration into commercial activity within a local authority environment. The research considers the implications and complications of such fundraising in the public sector, including discussions on key related business disciplines of marketing, strategy, and workforce development. A reflection on key findings follows, identifying key themes and highlighting gaps in the literature. Recommendations for further areas of research are outlined, and an overview of the contribution that this study will make to future inquiry. Findings from the literature review are used to inform the questions that are set to interview participants.

An evaluation of the methodological design used to undertake the primary qualitative research data is discussed in Chapter 3, which presents a justification of the chosen research method through an exploration of the researcher's philosophical standpoint. This includes a rationalisation of an interpretivist, inductive approach to data collection, to capture subjective, information-rich data from StoriPowys consumers for evaluation, by way of semi-structured interviews. A review of the research

process follows, outlining the choice of a thematic analysis approach to interpret the interview transcripts.

Chapter 4 presents the findings from thematic analysis of the semi-structured interviews, with evidence presented by theme in the form of user quotations.

Interpretation and discussion of the data follows in relation to the research questions and aims, and a reflection on the limitations of the study and suggestions for future research is presented. Finally, the investigation concludes with a series of recommendations for income generation strategy development, to meet the final research objective.



## **Literature Review**

### **Introduction**

This chapter intends to provide a comprehensive analysis of professional and academic literature relating to income generation in public libraries and museums, to determine future fundraising strategy for Powys' Cultural Services. Investigation seeks a global perspective, and the researcher has sourced evidence predominantly from the UK and North America.

A review of the literature attempts to answer research questions 1-4, and thus focuses on the following areas: effective income generation initiatives in libraries and museums worldwide; the use of evolving technologies to raise funds; and fundraising strategies used by similar organisations that have a successful track record in income generation activity. Income generation activities considered include grassroots initiatives, membership models, and commercial activity. A discussion on the use of development trusts and Friends groups follows, before moving to a review of the literature regarding the use of digital technologies to generate income. A reflection on each of these areas in a strategic context is presented, followed by a general overview of findings relating to income generation strategy. Finally, a review of the literature considers the sustainability of these strategies and, where appropriate, consideration from a local government perspective is offered.

### **Grassroots and ad hoc Activity**

There are many examples of staff in libraries and museums innovating to raise funds income (Public Libraries News, 2022), and the public library approach appears to

focus on grassroots activity to generate income. As community facilities, public libraries are uniquely placed to understand and respond to the needs of residents as a very local level, and evidence of library staff engaging in income generating pursuits with a personalised slant can be found in the literature. Staff at Jane Morgan Memorial Library, Wisconsin, have achieved small but steady income by identifying and responding to a public need by providing a volunteer-led clothing alterations service (American Libraries Association, 2019). Revenue from donations not only funds library stock but has also brought a new audience to the facility. Alpine Public Library, Texas, finds success in fundraising 76% of its budget through various grassroots activities, including spelling bee competitions and a silent auction as part of an annual ArtWalk Alpine event. Support from the Friends group is key, to forge strong relationships with the community so that ongoing donor support continues (Civitello, 2017, p. 13).

There are diverse examples across the US of raising funds for summer programmes, including Upshur County Library's crowdfunding campaign (GoFundMe, 2021), Wharton Public Library's merchandise fundraiser (Custom Ink, 2022) and Evergreen Park Public Library's virtual fundraiser basket (Evergreen Park Library, 2021). Jacksonville Public Library, Illinois, generates a respectable \$6,000 via its annual "Hi-\$5 for Reading" campaign, which takes a multifaceted approach to donor marketing through various online and in person channels (Civitello, 2017, pp. 11-12). It is part of its broader giving strategy to support the \$40,000 summer reading programme for children with the goal of achieving sustainable funding for it, even if traditional funding sources were to disappear. Public libraries across the UK, including Powys, run similar summer reading programmes (Reading Agency, 2022), but from the researcher's own experiences of financing programme materials, UK

libraries tend to fund such initiatives through government grants and internal funds, which puts increasing pressure on library budgets to fund programme materials and associated activities. For an initiative that runs annually, the success of fundraising ventures suggests that running similar campaigns would prove fruitful.

## **Membership Models**

A popular fundraising model for cultural and heritage organisations that emerges from research is a donor membership scheme. In smaller public libraries, where the ethos is to provide free access to resources, and where these services have little to “sell”, membership models tend to operate as Friends of the Library schemes. These initiatives can generate funds to support library activities and help sustain educational and community programmes (Mountainside Public Library, 2022). As Friends groups run independently of the libraries they support, the success of membership initiatives is largely dependent on external support to drive sponsorship. More sophisticated membership models can be found within organisations that not only have the capacity to manage them but are able to offer rewards packages to affiliates. These models sometimes provide tiers of membership that offer benefits to members that are commensurate with the donation (City Museum, 2022) or memberships that provide discounts on exhibitions and members-only events (New York Public Library, 2022; Milwaukee Art Museum, 2022). Broader philanthropic fundraising strategy may consider the option of Legacy Giving (Libraries Unlimited, 2022; Milwaukee Art Museum, 2022).

The range and popularity of membership schemes makes this an option worth exploring, but the impact on organisations of managing and retaining donors requires

significant time investment (Miguel, 2022). Academic research is scarce and evidence of the return on investment in libraries and museums would be helpful.

## **Commercialism**

Many cultural organisations have adopted commercial practices to enhance revenue. Norfolk museums have exploited their unique facilities to provide various venue hire offers, including corporate events, private exhibition viewings, weddings, and film hire (Norfolk Museums, 2022). A case study of the wedding service emphasises the need to know one's limitations in terms of what is feasible, and to ensure that the museum visitor experience and access to the collections is not compromised by commercial endeavours (Share Museums East, 2018). In this instance, success has been achieved through outsourcing wedding planning to a third party, and diminished profits are offset by the time commitment that museum staff would otherwise have made. Weddings in libraries and museums are a popular choice, from large institutions where bookings are coordinated by events teams (NYPL, 2022; Toronto Public Library, 2022; Madison Public Library, 2022; Kitchener Public Library, 2022;) to smaller community libraries where smaller scale offerings generate income via simple room-only bookings (Fulham Library, 2022; National Mining Museum, 2022).

Creative leveraging of room hire stretches beyond weddings. South Lanarkshire Leisure and Culture (2022) earns a moderate income from hosting birthday parties at select libraries, and this trend can be seen elsewhere across the globe (Douglas County Libraries, 2022; Australian National Maritime Museum, 2022). Numerous

examples of similar initiatives can be found, with varying degrees of sophistication in terms of event packages.

Another common commercial add-on to cultural venues is cafes. Traditionally associated with larger museum venues to provide an enhanced visitor experience, cafes are increasingly popping up in libraries and smaller museums. A guide to successful museum cafes (AIM, 2020) outlines the pros and cons of running these services, including the level of turnover needed to turn a healthy profit. This figure may be high for some, particularly in areas where visitor footfall may be low, although interestingly the advice echoes what has emerged elsewhere in the literature, that income from a single project is not necessarily the ultimate goal: the visitor experience remains the focus, which in turn brings repeat trade, which then drives future engagement (ibid., p. 3.). A recent report on arts and cultural organisations in England (Arts Council England, 2020) highlights the important role of cafes and other amenities in rural and under provided-for areas and suggests that these spaces will play a longer-term role in reanimating local economies post-Covid. Evidently it is worth considering the bigger picture when developing strategies for sustainable services. There are countless examples of libraries and museums with some form of coffee shop or other hospitality service attached. Those that stand out from the crowd do so by capitalising on their assets by tailoring their offers to their collections (Mitsitam Café, 2022; Museums Association, 2020). Whilst these are world class facilities, learning can be used and implemented on a smaller scale. In a library setting, Civitello (2017) identifies case studies of public libraries that are successfully operating cafés through partnership working with organisations that hold similar values. Lawrenceburg Public Library, Illinois, operates their café alongside a local rehabilitation centre, and both share the financial burden. The second of the

case studies presents a collaboration between Beloit Public Library, Wisconsin, and the local high school, where students earn college credits for participating in service delivery and the income is shared between school and library (Beloit Public Library, 2022). In both cases, a shared vision and strategic goals that are aligned serves both partners well, leading to future development of new and existing services (Civitello, 2017, p. 13). Another key player in driving revenue is income from retail. Traditional gift shops have met with the same challenges as cafes, in that they have struggled to make significant profits in rural communities and cities where footfall is substantially lower than in cities and large towns. However, opportunities for retail are gaining traction, and evidence of innovation in this field is growing. Public Libraries News (2022) cites several retail initiatives that have been trialled in the UK, and the results look promising. The introduction of Amazon Lockers in West Sussex Libraries back in 2016 has been highlighted, and an internet search suggests that this service is still being provided. Moderate yet regular income has been reported, and a case study by the Department for Digital, Culture, Media & Sport (2016) presents it as a viable income generator for libraries. One concern, however, is that a decent level of footfall would be required to ensure that suitable demand for the service exists, so this proposal may not be the best course of action in rural Powys. It is also conceivable that a partnership with a book retailer, as presented in this example, may not be the best match for public libraries.

There is a growing trend in museums to focus on merchandising their collections. Collaborations between cultural institutions and brand licensing companies are developing creative ways to promote products and services: case studies can be found on the licensing company Artistory's website, such as home appliance Abode's collaboration with the National Gallery in London (Artistory, 2022). Further

examples can be found on Alfilo Brand's website, where case studies of partnerships with Brooklyn Museum and the Metropolitan Museum of Art, amongst others, can be found. It's clear that innovation is a driving force with these partnerships, with collaborations ranging from traditional retail branding to immersive experiences where art is integrated with video gaming, food, and pop-up stores (Alfilo, 2022).

An interview with the founder of Alfilo discusses the company's partnership with the British Museum (Ruiz, 2022), which highlights the financial success of the collaboration. To expect smaller cultural organisations to develop partnerships on this scale would be unrealistic as they lack the human and financial resources to invest in such a project, and more research is needed to establish how easily this might translate in other settings. However, it does provide food for thought in terms of exploring smaller-scale initiatives. The approach to merchandising is perhaps the biggest takeaway, and the future of cultural retail is about engaging the consumer with immersive, relatable experiences (Saffra, 2022).

## **Corporate Support**

There are many examples of corporate sponsorship arrangements in cultural institutions. Prominent establishments, such as the British Museum and the New York Public Library, have sleek corporate programmes, including membership, events, and benefits, all of which are managed by dedicated teams (British Library, 2022; New York Public Library, 2022). Other organisations have a similarly structured, yet less business-like, approach to courting corporate sponsors: the Brooklyn Public Library network's corporate support programme is very much focused promoting its core services and engages potential sponsors with its

education- and literacy-related objectives (Brooklyn Public Library, 2022). More examples can be found in the Brooklyn area alone (Brooklyn Children's Museum, 2022; Brooklyn Museum, 2022), as well as much closer to home in Wales (Amgueddfa Cymru, 2022), where opportunities are tailored to the organisations and include capital developments, community programmes and exhibitions.

Academic literature on the success and sustainability of corporate sponsorship is limited, particularly in reference to public libraries. An exploration of the consumer response to corporate sponsorships in museums against the backdrop of Covid-19 highlights the challenges of this type of sponsor, and the social, environmental, and ethical considerations of working with corporate partners (Biraglia & Gerrath, 2021). Consumers, particularly millennials and younger, are impacted by the perceived credibility of a business (Wang & Holznagel, 2021) and cultural organisations must carefully consider how appropriate a partner organisation might be when signing up to sponsorship arrangements, perhaps more so in a more prescriptive local government setting.

Tysiac (2016, p. 36) asserts that organisations entering into business partnerships or sponsorship arrangements need to factor in good business sense in terms of whether the business is the right fit for the organisation. Furthermore, these partnerships must align with the mission of the organisation and these objectives must outweigh financial priorities. An MLA report (2011, p. 26) recommends corporate support as an area of income generation for museums to pursue, and a distinction is made between standard corporate sponsorship as a business transaction versus the alternative approach whereby businesses fund cultural activity as part of their Corporate Social Responsibility programmes.



## **Development Trusts and Friends Groups**

An opportunity that is gaining traction amongst public bodies in the UK is the establishment of Development Trusts: community owned, not for private profit organisations that engage in economic, social, and environmental regeneration (Development Trusts Association Wales, 2022). They are independently run, but work in partnerships with other organisations, including public bodies, to achieve their aims. Entrepreneurial activity supports grant funding opportunities, which may include the establishment of trading companies to support this (Wilcox, 1998), which can provide some council-run services with alternative income generation sources that remain closed to local authorities. Development Trusts Association Wales (2022) cites an estimated 600 development trusts in the UK, with community assets of £560 million.

A search of online academic resources has failed to locate discussion regarding the success (or failure) of cultural development trusts, however, there is evidence of several trusts in the cultural sphere which seem promising. Manchester Central Library Development Trust (2022) is one example, which was established to support both the Manchester Council-run central library, and other libraries across the city, through fundraising activity for educational and cultural benefit. An overview of its financial history on the Charity Commission website (Charity Commission, 2022) shows modest, yet increasing, profits since 2017, which is likely to have been hampered somewhat by the Covid-19 pandemic. The trust's website cites achievements that include raising funds for the refurbishment of Central Library as well as funding several engagement events and initiatives. The Norfolk Museums

Development Foundation (Norfolk Museums, 2022) has a similar set-up, where the trust covers all 10 local authority museums, which shows a steady profit until the recent pandemic (Charity Commission, 2022). Further examples can be found in the Tyne & Wear Archives & Museums Development Trust (Tyne & Wear Archives & Museums, 2022), which supports the services of 4 local authorities in the area and has been operating since 2010; and more recently, the Oriel Môn Trust (Oriel Môn, 2022) which supports its namesake museum and art gallery through charitable fundraising that supplements the financial contributions made by Anglesey County Council.

A 2018 report (Education Scotland and Development Trusts Association Scotland) on the impact of development trusts in Scotland highlights not only their benefits in terms of social value, but also the economic impact of the six trusts that participated in the research. both strengths and weaknesses of this approach. Four of the six trusts each secured investments of over £1 million for their local communities, and additional economic benefits referenced improvements to building assets and development of enterprise projects to reduce reliance on external funding (ibid., pp. 2-3). However, the review presents the need for a high level of commitment from trustees and volunteers to guarantee success and a robust strategic framework to ensure sustainability as these organisations evolve (ibid., p. 4). Whilst the report underlines useful learning, it reflects the experiences of a small number of trusts and further study is needed to capture a broader picture of development trust success or failure in the UK. Furthermore, in the context of income generation in local authority cultural services, the transferability of the report findings may be limited, as activities that may prove effective in the organisations studied may not translate to a cultural setting. Wilcox (1998) acknowledges risks associated with development trusts,

primarily relating to a lack of clarity regarding core objectives and the path to financial sustainability. However, for the researcher, it would be useful to view the challenges in the context of real-life scenarios; detailed case studies would provide richer information to better understand how and why some trusts fail.

A popular adjunct to many libraries, museum and archives are Friends groups, generally set up by local members of the community to help deliver and sponsor grassroots activities within the locale. There are many Friends groups across Wales (including Powys) and beyond (British Association of Friends of Museums, 2022; Library Campaign, 2022) who advocate for services and conduct low level funding, e.g., running book sales and sponsoring activity programmes (American Library Association, 2022). Ashman (2002, p.35) recommends making the distinction between traditional Friends groups and constituted organisations, and that members of the former would not be expected to possess the financial and political characteristics that would be demanded of the latter, where a more strategic approach to fundraising would be required.

Research suggests that numerous Friends groups paused activities or disbanded completely during the pandemic (Gerber, 2021). A report on the role of volunteering in philanthropy (Fidelity Charitable, 2020, p.14) found that Covid-19 drove 65% of volunteers to virtual activity, although there is a clear preference for in-person contribution (ibid., p.19). Of the surveyed volunteers that ceased activity during the pandemic, three-quarters of them hoped to return to their old roles in the future. This paints a hopeful picture, but a settled post-pandemic volunteer landscape is still largely unknown, and research is still emerging, A reliance on evidence of success stories from Friends' fundraising initiatives pre-pandemic should perhaps be treated

with some caution, and these groups should be looking to emerging trends in donor engagement to provide true, sustainable value.

## **Digital Developments**

Advances in digital technologies have transformed how audiences engage with culture (Department for Digital, Culture, Media & Sport, 2019) and inevitably is disrupting the traditional fundraising landscape. CAF's annual giving research (Charities Aid Foundation, 2022, p. 20) reports that a 26% share of charitable donors in the UK is now dedicated to online giving. Options for online giving are now a staple for many public library and heritage organisations (Queens Public Library, 2022; Barnsley Museums & Heritage Trust, 2022), and one would expect to find options ranging from "donate" buttons on website homepages to dedicated webpages for a range of online giving options.

Research suggests that a holistic approach to philanthropic giving should be adopted, and an effective fundraising strategy should be communicated via both digital and more traditional physical channels such as donations boxes (Museum Next, 2022). Social media is a big driver in digital fundraising campaigns and numerous examples can be found online. North American libraries have harnessed their collective powers of communication to run an annual online giving campaign (Library Giving Day, 2022); and a guide to social media for fundraising highlights a range of marketing tools, with examples, to encourage donor engagement spanning creative storytelling to viral challenges (Goodbox, 2021). Goodbox (2022) evidences several digital fundraising case studies which emphasise the benefits to donor engagement that improved in-house technologies can bring. The success of the

ALS Association's Ice bucket Challenge (Tysiac, 2016, p. 36) illustrates the far-reaching effects of an innovative social media fundraising campaign, which proved not only an outstanding fundraising achievement but also allowed the organisation to promote its cause to millions of Facebook subscribers. Tysiac goes on to stress that social media campaigns are an important and effective tool to engage the younger donors of the future and cites the Eiteljorg Museum's donor programme for under 40s as an example of good practice (Tysiac, 2016, p. 37).

Advancing technologies in recent years have seen an increase in digital engagement with cultural services. Online participation increased dramatically in response to the COVID-19 pandemic, when museums and libraries across the world were closed to the public found creative ways to transfer the in-person visitor experience to a virtual environment. An account of Chinese museums' online activities during the pandemic (Jin and Min, 2021, pp. 35-36) highlights the extensive scope for online interactions with visitors via a range of platforms across digital devices. Virtual museum tours, specialist talks, and eCommerce events with established online retailers, marketed products to promote the museum collections. Outcomes for both retail and visitor experience transcended the online experience, with virtual visits promoting in-person visits as well as increased opportunities for partnership collaboration to develop the retail offer (*ibid.*, p. 37).

The well-developed digital infrastructure in these Chinese museums made this transition easier than may be found in other organisations worldwide but is nevertheless an excellent example of the potential for online interaction in the digital age. The learning from the Chinese museums' case studies is that to ensure sustained, successful online activity, digitalisation of services must be integrated into working practice, and that the retail offer should be secondary to the delivery of a

varied and interactive online programme to deliver an excellent visitor experience (Jin and Min, 2021, pp. 40-41).

Additional ideas for funding online activity includes the potential for monetising digital content. A search for academic literature on this phenomenon in a cultural setting has been fruitless but examples of innovation in this field during the Covid-19 pandemic can be found online. An article from the American Alliance of Museums (2020) illustrates how finding creative ways to link collections with audiences can be an effective revenue generator. Examples include the National Steinbeck Center's digital membership, where an annual fee will unlock members-only digital content (National Steinbeck Center, 2022); and Tracy Aviary's "pay-what-you-want" digital content pricing scheme (Tracy Aviary, 2020), that operates much like the Guardian Newspaper's online micro-donation model which encourages rather than enforces payment (Museums Next, 2020).

## **Crowdfunding**

National cultural organisations at home and overseas are actively promoting crowdfunding as a viable source of income generation (National Archives, 2022), and examples of nationwide crowdfunding initiatives are evident, both through partnerships with established crowdfunding platforms (Museums Association, 2022) and the setting up of crowdfunding websites specifically to promote cultural services (Art Fund, 2022; EveryLibrary Institute, 2019). EveryLibrary Institute's Fund Libraries website hosts a range of library- and literacy-related campaigns (Fund Libraries, 2022) with varying degrees of success, in some contrast to the sleeker Art Happens crowdfunding website (Art Fund, 2022), where many hugely successful campaigns

are evident. Ryu & Suh (2021) argue that choice of crowdfunding platform is crucial to the success of a project, and that one must also consider the donor-platform relationship as well as the donor's relationship to the cause.

The crowdfunding approach is also critical, with donation- and reward-based crowdfunding both popular approaches in the cultural sector. An exploration of Crowdfunder provides successful examples of both (although more weighted to reward-based offerings): the Fashion and Textile Museum's reward-based drive for post-Covid financial support offered a range of bespoke products and experiences to donors, depending on their level of contribution (Crowdfunder, 2022a). Alternatively, a donor-based approach can be seen in National Museum Liverpool's plea for similar funding, where the approach was to promote the value of what a set donation could mean to a visitor rather than a donor (Crowdfunder, 2022b). There are myriad examples of both types on this platform and elsewhere, suggesting that crowdfunding in the cultural sector is becoming embedded as an effective fundraising solution for cultural organisations. However, it is important to note that evidence of library crowdfunding is scantier, illustrating perhaps that museums can capitalise on their collections to offer more appealing rewards for donors.

Whilst individual crowdfunding campaigns are finite, the opportunity to undertake further campaigns exists. Moreover, the benefits of value creation, co-creation and innovation that can emerge from crowdfunding campaigns (Mollick, 2016) has the potential to extend audience reach and customer engagement, thereby creating new opportunity for future initiatives. Research also points to the advantage of GLAM (Galleries, Libraries, Archives and Museums) organisations due to their credibility and strong relationships with communities, and that success depends on running crowdfunding projects that are meaningful (Riley-Huff et al., 2019) and encourage

empathy, particularly in the charitable sector (Liu, Suh, & Wagner, 2018). Further research stresses the importance of community engagement to ensure success, cultivating donor support through high levels of engagement and transparency throughout the campaign process (Donelli, 2018).

## **Strategy**

Drawing from the research above, several strategic considerations have emerged. These centre primarily around workforce capacity and capability; the benefits of effective collaboration; and the need to balance commercial gain with the purpose of the organisation.

A 2012 review of income generation activity in museums in the north of England highlighted several barriers to staff fundraising, namely the lack of time and a lack of expertise, followed by inappropriate space for events or shop sales, a low footfall and a workforce culture which naturally prioritises public service over revenue generation (Woodward, 2012, pp. 22-23). Similar arguments can be found in the research (TBR, 2015, p. 26; Museums Association, 2020, pp. 20-21). Emphasising such barriers can help determine future strategy: issues of staff capacity and inadequate fundraising skills are a recurrent theme throughout the literature (Museums Association, 2022, p.21) and both should be addressed when developing strategic direction in fundraising. The Museums, Libraries and Archives Council suggests that organisations could harness the capabilities of a volunteer workforce to help deliver enterprising initiatives (MLA, 2011, p. 31). However, volunteer skills development may prove challenging, as could volunteer management where teams of staff are small.



For government-run institutions that have the means to transform, incorporation of income development activity into all aspects of day-to-day operations can be the answer. In the late 20th century, Fairfax County Library, Virginia, took the brave decision to rethink their development strategies and embrace revenue generation as part of daily working practice (Kernochoon, 2016, p. 134). This supports the argument from Peet (2016), that a holistic approach to fundraising strategy is necessary, and to achieve financial success a 'buy-in' from patrons is essential.

A review of the literature indicates that a key success factor in sustainable cultural services is effective leadership and an organisational culture where employees advocate for, and raise the profile of, the services they represent. Evidence from Arts Council England (TBR, 2015, pp. 9-10, p. 26) suggests that forward-looking, risk-taking leaders are critical to the success of enterprising museums; as well as development of staff skills and behaviour to build an agile, innovative, and entrepreneurial workforce that is adaptive to a changing environment. Guidance from the Association of Independent Museums dictates that a museum fundraising campaign should be bought into by the entire organisation, and it cites effective communication, clear organisational aims, a trained workforce, and comprehensive financial systems as essential to success (AIM, 2013, PP. 4-7). Encouraging a culture of innovation using staff incentives and allowing experimentation in a fail-safe environment is recommended (MLA, 2011, p. 22).

Workforce development strategy must consider the post-Covid landscape. A survey undertaken by Library Journal (Gerber, 2021, pp.2-3) points to a shift in fundraising methods during the Covid-19 pandemic, with grant fundraising surpassing other

regular fundraising methods that were suspended at the time. Staff priorities were refocused to grantsmanship activities and the development of philanthropic skills, and whether there will be a return to “normal” remains to be seen.

An MLA report on museum sustainability highlights the need for museums to develop an entrepreneurial staff to ensure economic sustainability, citing the opportunity presented to museums to engage a captive audience of visitors with the museum brand. The report suggests that staff should be capitalising on exploitation of the museum’s assets, building a retail offer that offers products promoting the museum’s collections, and presents examples of museum collaborations with well-known retailers and instances of “brand collusions” (MLA, 2011, p. 24). Further evidence of entrepreneurial practice provided includes examples of joint ventures, where museums have sub-contracted well-known businesses to deliver services on their behalf (ibid).

## **Sustainability**

Income generation in public sector cultural services is still relatively new, and only time will tell how successful these fundraising models will be in the longer term. A report undertaken by TBR (2015, p. 7) discusses the ‘resilience’ of museums as defined in social, economic, and environmental contexts and posits that resilience and sustainability must be viewed as an ongoing process, suggesting that a success is dependent on an organisation’s ability and willingness to embrace change and innovative practice.

The rurality of StoriPowys warranted a search for examples of sustainable fundraising practice in similar, rural cultural organisations, but evidence is scarce.

Looking close to home at Scottish libraries and museums, activity mirrors that taking place elsewhere, where institutions are grappling with new technologies and issues of workforce capacity and capability. A report on the state of heritage funding in Scotland (Arts and Business Scotland, 2018) highlights these challenges, and recommends a 'Golden Tripod' approach to fundraising, to generate income from public, private and earned income sources, with a focus on the development of entrepreneurial activity.

The ability to generate earned revenue within government-run cultural services is somewhat dependent on local authority support and 'buy-in'. As councils have become increasingly dependent on finding new ways to generate income, research suggests that learning in the field has led to a more considered approach to raising funds. A report on commercial enterprise in local government (Mills et al., 2021) argues that councils must attune their entrepreneurial activity to local priorities and public value creation. It outlines a Commercial Maturity Model (ibid., pp. 8-10) approach, focusing on the alignment of commercial and corporate strategy; development of relevant business skills and better use of commercial data; and cultural change within the organisation to instil an ethos of enterprise that aligns with its core values. A case study of Wealdon District Council (ibid., p. 28) illustrates that by ensuring commercial projects are closely bound to the delivery of public value for communities, buy-in from locals can bolster the success of these projects. So too with the development trust model, where the ongoing financial success of these trusts is inextricably tied to the work that councils and individuals do *with* and *for* their communities.

## **Conclusion**

This literature review has considered a range of academic and professional material, as well as online news articles and websites of cultural organisations globally.

Academic literature on income generation activity within the sector is scarce, and what does exist is largely outdated. Evidence of success stories often comes in the form of news articles and case studies, which focus on the launch of a new initiative, rather than addressing its longer-term outcomes. An academic exploration of the sustainability of these initiatives is needed, identifying not only the factors that make a project successful, but also the failures and lessons learned. Qualitative data from staff and leaders would also be useful, as would quantifiable financial data from organisations.

The impact of digital disruption on income generation is relatively new phenomenon, but it is expected that as innovation and experimentation continue to emerge, so too will the research. The full impact of the Covid-19 pandemic on donor and visitor engagement has yet to be determined, and future analysis of the post-pandemic visitor experience, and fundraising landscape, will be welcome.

It is hoped that this new research will contribute to building the overall picture of income generation activity in library, museum, and archive services, and how initiatives may be successfully implemented in rural, local government setting. It is also the intention that this investigation will contribute to knowledge-building of the appetite for donor support and consumer participation in the post-pandemic environment.

## **Research Methodology**

The following chapter covers the research methodology adopted: the strategic reasoning for methods employed (Crotty, 1998, pp. 1-3) and the path to finding answers to research questions (Kumar, 2014) to achieve the primary research aims of this study. To recap, the aims and objectives of this study were as follows:

### **Aim:**

To investigate how income generating activities in the cultural sector can be used to develop an income generation strategy for Powys County Council's cultural services

### **Research objectives:**

1. To critically review the relevant literature surrounding income generation activities in cultural and non-profit sectors globally
2. To undertake user surveys and conduct semi-structured interviews with consumers to determine customer opinion on the potential implementation of income generating activities proven successful worldwide
3. To develop an income generation strategy for StoriPowys and roadmap for sustainability

Chosen methodology relates to the second objective: to obtain qualitative data in the form of consumer interview and survey feedback. Primary data was collated through semi-structured interviews with library customers and museum visitors of StoriPowys facilities across the county. Secondary data sources include reviews of academic literature, websites, and databases of statutory and not-for-profit organisations.

A systematic approach to research methodology was undertaken using Saunders' Research Onion model (Saunders et al, 2019, p. 130), to determine appropriate research strategy. It highlights the complex layers of academic research and the epistemological, ontological, and practical approaches that must be considered in the design process. A rationale for the chosen approaches is outlined below, followed by an overview of the sampling process and a reflection on ethical and logistical considerations.

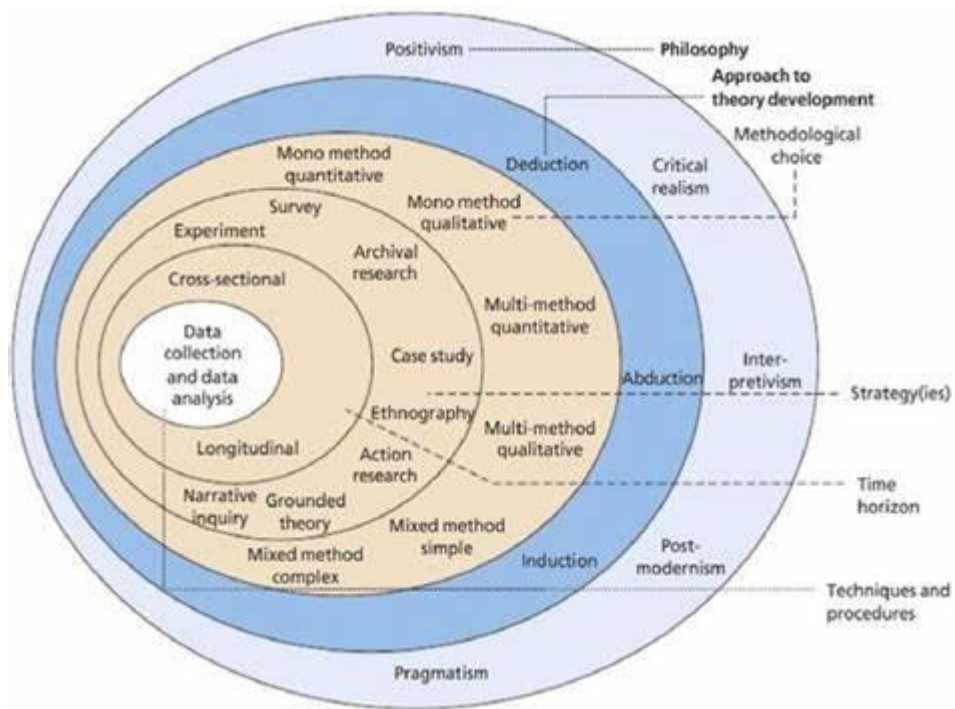


Figure 1, The Research Onion (Saunders et al, 2019, p. 130).

## **Research Philosophy**

Academics agree that researchers have assumptions about the nature of the social world and the way in which it may be investigated (Burrell & Morgan, 2016; Crotty, 1998, p. 7). These assumptions influence one's approach to research investigation and how the findings are interpreted, and are centred around 3 philosophical perspectives of Epistemology: origins and nature of knowing (Maykut & Morhouse, 1994, p. 4), and how we come to know what we know (Saunders et al, 2019, p. 133); Ontology: the nature of being (Spencer, Pryce and Walsh, 2020), and Axiology: the role of the researcher's own values (Saunders et al, 2019, p. 134). The adoption of a philosophical standpoint can be formed through a rationalisation of these assumptions (Saunders et al, 2019, pp. 130-131).

The Research Onion points to 3 epistemological research paradigms: Positivist, Pragmatist, and Interpretivist, with further concepts explored by Grix (2004, pp. 78-88), Spencer, Pryce, and Walsh (2020, pp. 5-18) and Saunders et al (2019, pp. 144-151).

An Interpretivist philosophy was adopted for this research. Interpretivism is characterised by subjectivity (Saunders et al, 2019, pp.135-137) and a belief that social reality is shaped by our perceptions (Collis & Hussey, 2014, pp. 44-45). In contrast to Positivism, the interpretive perspective allows the researcher to understand what is happening in a given context, rather than quantifying it (O'Gorman and MacIntosh, p. 65). Saunders et al (2019, p. 149) posit that the role of the interpretivist researcher is to create new understanding of social worlds through recognition of the complex and divergent social realities that people experience. This perspective was a natural fit for the research objective, which sought to understand

what fundraising initiatives service users would be prepared to engage positively with.

From an ontological perspective, interpretivism is multiple and comparative (Saunders et al, 2019, p. 145). The success of income generating activities in StoriPowys depends on service users: their interest in, and engagement with, the activity programme, and a recognition that each customer's experiences and needs are very different. The epistemology of interpretivism seeks meaning from relationships and the social experiences being observed (O'Gorman and MacIntosh, p. 59). In terms of this research, emphasis was placed on service user opinion and experience, and the need to build research data that captured the diversity of the user base. From an axiological standpoint, research is value-bound, and the researcher's own values are tied with the subject being researched (Grix, 2004, p. 83). The research analysed was aligned to the researcher's own professional experiences within a cultural services organisation.

Positivism, as defined by Brinkmann (2017, p. 47) posits that knowledge can only be legitimised if positively verified. This philosophy is characterised by objectivity and facts that can be proven, and in the context of the research objective, this approach would not allow for the depth of personal experience and knowledge that was required to answer the research question (Saunders et al, 2019, p. 134).

Pragmatism adopts philosophical positions of both positivist and interpretivist philosophies (Collis & Hussey, 2014, p. 54), where the ontology is framed through action, and the appropriate research method is determined by the nature of the research problem (Ibid). A practical outcome would need to be incorporated with this



approach (Saunders et al, 2019, p. 151), which did not correlate with the research objectives.

### **Research Approach**

Academics point to two main types of scientific enquiry: Deductive and Inductive reasoning (Adams et al, 2007, p. 29). Both are modes of argument that rely on the premise of using existing knowledge to draw conclusions or advance knowledge (Woiceshyn and Daellenbach, 2018, pp. 183-195). The former starts with a hypothesis and examines the possibilities to reach a logical conclusion and is analytical in nature (Grix, 2004, p. 113). For this reason, it is associated primarily with quantitative data (Saunders, 2019, p. 153).

By contrast, Inductive reasoning is observational in nature; the emphasis is on evidence-gathering and building theory based on the research findings or justifying hypotheses using empirical data, using a “bottom up” approach (Sachdeva, 2019, p. 31). To answer the research question, an inductive approach was required. The appetite for fundraising initiatives in StoriPowys was unknown, and investigation was needed to determine next steps in a fundraising strategy.

### **Research Strategy**

The research aimed to answer the question of whether successful fundraising activities elsewhere would be worth pursuing in rural Powys. Evidence in the form of customer opinion was collected, with the evidence used to inform recommendations for a StoriPowys fundraising strategy.

How the research was undertaken in practical terms was dictated by the research method, and this method reflected the philosophical assumptions of the chosen paradigm (Collis and Hussey, 2014, p. 59), which was identified as interpretivism. There are several methodologies associated with interpretivism, and the inductive process (ibid., pp. 64-70), and from these, the Grounded Theory approach was selected. Grounded Theory is a data analysis method that uses data to build theory (Cottrell, 2019, p. 103). Developed by Glaser and Strauss in 1967, this approach uses empirical data as the starting point, building theory from the research findings that is grounded in the data (Denscombe, 2014, p. 156). Silverman (2006, cited in O’Gorman, 2014, p. 143) outlines the stages of a grounded theory approach, searching for meanings and patterns in the data, developing categories (coding) which provide the framework for the emergence of new theories. Denscombe (2014, p. 164) asserts that a flexible and open-minded attitude from the researcher is required, and a “constant, comparative method” is needed as emerging concepts lead to new lines of enquiry and further data analysis.

This organic development of theory has limitations as analysis of this emerging data can be laborious and ambiguous (Cottrell, 2019, p. 103), however, with interview participants limited to 10, this did not hinder the research process.

### **Methodological Choice**

Saunders’ Research Onion lists three categories of data collection that can be used for research: mono and mixed methods that use either qualitative or quantitative data, or multi-method, which includes both data types (Saunders. 2019, p. 176). Quantitative data is measurable and numerical in nature, and is embraced by the

objective, positivist research approach (Adams, 2007, p. 26). Conversely, qualitative data cannot be objectively measured: it is non-numerical information that researchers use to find meaning in, and understanding of, social phenomena (Flick, 2008, p. 3). Qualitative research creates “accounts of social life and in doing so we construct versions of the social worlds and the social actors that we observe” Coffey and Atkinson (1998, cited in Campbell, Taylor and McGlade, 2007, p. 67). This fits with the subjective, interpretivist viewpoint and a mono-method was used to undertake qualitative research in the form of semi-structured interviews and user questionnaires.

### **Time Horizon**

A cross-sectional time horizon was used to undertake customer interviews and questionnaires. Saunders (2019, p. 212) describes a cross-sectional study as a “snapshot”, where data is collected once over a short period, as opposed to longitudinal studies, where data is collected over a protracted period on more than one occasion (Collis and Hussey, 2014, p. 64). The research question did not seek to explore changes in participants’ opinions and data analysis over an extended period was not required. Interviews were conducted over a 3-week period during October and November 2022.

### **Techniques & Procedures**

For this qualitative research, primary data was collected in the form of semi-structured interviews. Interviews are a main source of data collection in qualitative research (Vanderstoep & Johnston, 2009, p. 224) and the most common method for

a grounded theory process (Matthews & Ross, 2010, p. 137). Patton (2015, p. 426) suggests that the purpose of interviewing is to discover another person's perspective, which aligns with the research aim to seek user opinion on fundraising initiatives. Semi-structured interviews permit a freedom that is lacking in structured interviews, allowing the interview to "be shaped by the interviewee's own understandings as well as the researcher's interests, and unexpected themes can emerge" (Lewis-Beck et al, 2004). Vanderstop & Johnston (2009, p. 225) posit that a semi-structured approach avoids the challenges in data variance that can stem from informal interviews and does not hamper the emergent discovery process in the way that structured interviews can.

Substantial data was generated from the semi-structured interviews, as open questions allowed participants to share their experiences and reactions to fundraising ideas in an organic way, which led to different avenues of enquiry. The interview questions can be found in **Appendix 1**. For this reason, data was analysed using a thematic analysis process, which is an effective method for analysing large datasets (Clarke & Braun, 2016, p. 298). Thematic analysis is a preferred data analysis method in qualitative research, used for identifying, analysing, and interpreting patterns of meaning by identifying codes and themes (Clarke & Braun, 2017). It is recognised for its flexibility, in terms of application to several epistemological frameworks and research techniques (Kiger & Varpio, 2020). Braun & Clarke (2006, p.80) assert that, although different to grounded theory, thematic analysis has a similar data coding process which is more appropriate to research that does not warrant the level of theory development that would be required to answer some research questions. As the research aim did not demand the development of significantly detailed theory-building, this type of analysis was

selected. Braun & Clarke also outline six phases of thematic analysis (ibid., p.87), which I used to evaluate the data.

The flexibility of this analysis allowed for a reflexive, inductive approach, and themes from user opinion of fundraising initiatives became apparent as the data was analysed. Reflexive, thematic analysis was appropriate as it allowed for the alteration of codes as thematic trends emerged (University of Auckland, 2022). Interviews focused on the opinions and experiences of participants in relation to examples of income generation activities that were presented to them. Interrogation of this data allowed the researcher to code relevant information and commonalities between participants, before determining overarching themes. Thematic analysis permitted the identification of recurring patterns in the interview data. In addition, it attempted to discover inferred meaning from interviewees' responses and to search for relationships in themes that emerged.

## **Sample**

A Purposive sampling (Duduvskiy, 2022) technique was used to select research participants. Purposive (Purposeful) sampling focuses on the selection of participants (cases) who will provide information-rich responses that are strategically aligned with the research aims (Patton, 2015, p. 264; Campbell et al., 2020, p. 654).

Yin (2016, p. 94) highlights the need to include variance in interview participant selection, with an emphasis on selecting interviewees who provide a broad range of perspectives on the research topic. The sample selected for this research was deliberately chosen to represent the broad StoriPowys customer base, in terms of

ages and interests. To align with the aim of the research, this technique allowed for the selection of interview participants that are supportive of cultural services and who were likely to be receptive, in principle, to fundraising initiatives. Purposive sampling allowed for these necessary assumptions, based on the researcher's understanding of StoriPowys customers and of fundraising in a cultural setting (Robinson, 2014). A typical case sample, which was expected to provide an average or normal profile on the phenomenon (Given, 2008), was identified, as the research aim was to establish the general appetite for fundraising initiatives that would be characteristic of StoriPowys consumers.

### **Ethical and Logistical Considerations**

An ethical review of the research proposal was undertaken, and approval was sought from the University of Wales Trinity Saint David via the dissertation research supervisor. PG2-E1 Ethics Form was completed (see **Appendix 2**), which details the dissertation research proposal and its compliance with guidance outlined in the University's Research Ethics and Integrity Code of Practice.

Authorisation to undertake consumer interviews and surveys was requested from Powys County Council's Information Compliance department and the Professional Lead for Cultural Services.

Research ethics addresses questions of morality in a research context (Wiles, 2012, p. 4), which largely focuses on the treatment of research subjects when focusing on the acquisition of qualitative data (Traianou, 2020, p. 87) and the "protection of societal concepts of right and wrong behaviour" (Hackett, Schwarzenbach and

Jürgens, 2016, p. 35). This would include, but is not limited to, informed consent, anonymity, confidentiality, and one must also consider academic integrity, where conflicts of interest may inform researcher bias (Cottrell, 2014, p. 107).

Written informed consent was obtained from interview participants via a consent form and information document that interviewees were provided with ahead of the session. The documents contained an outline of the project, the location and format of the interview process and details of safeguarding including participants' right to withdraw from the process at any time, and how their data would be stored and used. The information document also detailed the steps taken to ensure anonymity of consumer responses. A copy of the consent form can be found in **Appendix 3**. Collected interview data was anonymised accordingly and information contained nothing of a personal nature that would identify participants.

All personal information about registered customers was protected by Powys County Council's data protection regulations, in line with national GDPR guidance (Powys County Council, 2022). Storage of all data was cloud-based, stored on a personal OneDrive for Business application within Powys County Council's Microsoft Office 365 account. Data files were shared only with the dissertation supervisor, via an email link which allowed access to the recipient only.

Mitigation of bias was met through adherence to best practice guidelines in academic research (University of Wales, Trinity Saint David, 2022).

The project aims and objectives did not require data from children or vulnerable adults and no ethical or logistical assessments needed be made in relation to these groups.

It was recognised that the COVID-19 pandemic continued to upend social norms, and due consideration was given to the ethical and logistical implications of this, as outlined by Newman et al (2021).

### **Limitations of the study**

The literature review was met with some limitations. Academic and professional literature on fundraising in libraries and museums was quite scarce; academic investigation into less traditional methods of fundraising activity is in its infancy, particularly in relation to income generation using new technologies (Locality, 2015, p. 58).

In terms of primary research, an element of location bias was present with the interview sample, weighted towards participants in the south of Powys, due to the location of the researcher, the size of the county and difficulties with travel and time constraints. There is the potential that capturing opinion from people based further north, from more traditional, Welsh-speaking communities, would have shown some diversity from the somewhat anglicised south-based participants. Sample size also presented some limitations: public libraries and museums serve a variety of market segments whereas this research focused on the findings from a small sample of interview participants. It provides a snapshot of customer opinion across Powys' cultural services, and it is acknowledged that a larger sample would provide a richer source of information.

Caution is advised against researcher bias and the potential for choosing sources that confirm preconceptions when conducting thematic analysis (Yin, 2016, p. 94)



and whilst steps were taken to mitigate this, the researcher acknowledges that subjective, qualitative research carries this risk.

## Findings and Analysis

### Research setting

A series of interviews took place in October 2022, comprising 10 participants known to be museum supporters and/or library users. A purposive sampling approach was adopted, to ensure these individuals brought a relevant and important perspective to the research investigation (Robinson, 2014, p. 32). Interviewees were sought initially via email to Branch Librarians and Museum Curators across StoriPowys, with a request that they identify and approach regular service users and supporters who may be interested in participating in the study. From the responses received, a loose quota sampling strategy was employed (ibid., pp. 33-34), selecting participants with a range of ages and interests in cultural services, including those with volunteer experience, to represent the broad user base of StoriPowys. An overview of demographics and interests of selected participants can be found in **Table 1**, below.

Age Range	No.	Location in Powys	No.	Area of interest	No.	Volunteer experience	No.
18-24	1	South	4	Libraries	3	Yes	5
25-44	2	Mid	2	Museum	1	No	5
45-64	2	North	2	Libraries and Museums	6		
65+	5						

Table 1, Overview of participants' demographics and interests.

Potential interviewees were contacted with further information regarding the research, including details of anonymity, ethical considerations, data protection, and interview arrangements. A copy of the Interview Consent Form that was shared with participants can be found in **Appendix 3**.

### **Data collection**

A 10-question, semi-structured interview (**Appendix 1**) was used as a data collection tool, and questions were formulated using findings from the literature review regarding successful income generation activities in the cultural sector worldwide. The aim of these interviews was to answer research question 5: What is the appetite for, and feasibility of, implementing these successful initiatives in Powys? Interviews were conducted at library and museum sites over a 2-week period, according to the preference of the participant. Conversations were conducted in private meeting area, where all interviews were recorded, then transcribed at a later date.

To ensure anonymity, all ten participants were allocated an assumed name, and quotations are followed by participant identifier from A-J (Participant A, Participant B, etc.).

### **Data Analysis**

Raw data transcriptions were examined using inductive, thematic analysis, following a process of six phases as outlined by Braun and Clarke (2006, p. 87). Detailed

read-throughs of each interview transcript preceded the coding and categorisation of data as patterns emerged during more detailed analysis. An overview of codes and categories generated from the data in relation to the questions posed can be found in **Appendix 4**. An online word cloud generator was used to produce the diagram below (**Figure 2**). Coded text was input to generate the image, and the predominantly visible words help illustrate the emergence of patterns within the data, as specific themes become apparent.



Figure 2, Word cloud of coded interview data

### **Theme 1: Service delivery and principles**

A key theme that appeared throughout the data related to the delivery of existing library and museum services. Comments centred on matters relating to the impact of income generating activity on core services as well as effects on values traditionally upheld by cultural institutions. Comments around accountability were also prevalent, in terms of both the council’s responsibility to support the service, as well as the service’s responsibility to the public.

### **Impact on service provision**

The potential impact of income generating activity on core service delivery was raised as a concern by all participants at some point during the interviews.

Interviewees who occupied a volunteer role within the service, and therefore more aware of work pressures on library and museum staff, expressed doubt and concern about staff's capacity to deliver commercial events in addition to their usual workload:

*“There is an expectation of a minimum level of service which staff in a public service institution are expected to deliver. Be careful about crowding out their ability to perform that basic service”* (Participant A).

Another volunteer participant was extremely sceptical about the feasibility of having staff members manage such endeavours:

*“I can't see you doing it on the existing staffing”* (Participant F).

However, the observations were not strictly limited to those in volunteer roles, as evidenced by a regular library user:

*“Making sure that staff are paid extra is important as half the time you don't have enough staff to do the day-to-day work”* (Participant G).

Perspectives on the potential negative impact on core services varied when examined through a lens of a museum visitor, compared to a library customer. Those disposed to consider the museum drew attention to the practicalities of managing the

visitor experience if sections of the facility were cordoned off to host weddings and other events:

*“For people outside Breconshire who may travel a distance and not be able to access some places or see things, it might be a problem and reflect negatively on the perception of the museum” (Participant F).*

One participant was less disposed to rule out the possibility, providing restrictions were well communicated:

*“As a museum visitor I would want that communicated if something I wanted to see wasn’t available” (Participant I)*

Through a library lens, the impact on services to customers was flagged by 7 out of the 10 participants. And it was clear that although fundraising initiatives would be welcome, this should not come at the expense of service delivery:

*“As a mum making an effort to take my kids to a rural library, I’d be cross if my ability to use the service was impacted” (Participant I).*

*“Maybe a library gift shop defeats the purpose of a library, and I wouldn’t want the library to go off track and focus more on selling things rather than the people who need them” (Participant J).*

## **Values**

A recurrent theme in the data was the importance that participants attached to access to services. This manifested not only in observations about the impact on physical access to service if income generation were to become the norm, but also in

relation to financial barriers that users might face if charges were to be imposed.

Eight of the participants raised at least one of these aspects.

All participants were supportive of a museum café, with the majority believing that the public would expect this as part of the visitor experience. There were several comments about ensuring affordability as well as quality:

*“Make things affordable, offer a good product and you will get and keep customers”* (Participant E).

*“I feel sad though when the arts museums have fancy ones as they should be more available to the average citizen. They have high prices and are kind of expensive for not the best quality. I feel that if you are going to have it in a place that says we’re open access to as many people as we can then having it accessible than more than just the physical sense makes more sense”* (Participant A).

There was some acknowledgement of the difficulty in collocated library and museum facilities with finding the balance between catering to local library customers as well as tourists, which would be:

*“a slightly different level of comfort of charging than would be in some museums”* (Participant B).

There were similar concerns about access to paid online content, in terms of both accessible charges and the quality of the content being presented to the public.

*“The only thing about paying is that some people can’t afford it”* (Participant G).

*“If people have to view on laptops, or traffic makes picture bad, what are they paying for, will you see the detail of what’s in the collections”* (Participant A).

*“You need to make sure that the way that the activity is presented online is of good quality and not just a sense of people making do because they can’t come in. There’s a difference between what was put online during covid because there was no other option and a course that’s been specifically set up to be hosted online”* (Participant J).

Regarding corporate support, participants were somewhat conflicted. Whilst only one of the ten participants was entirely opposed to the premise, all bar one had concerns, and reported feeling “wary” or “uncomfortable” with the idea. All interviewees were adamant that only ethical companies should be considered as partners.

*“I guess a lot will be out for what they can get. It’s just what you have to do these days. It would need to be ethical”* (Participant G).

*“I wouldn’t feel relaxed about a company who was getting money in because it’s so abjectly commercial, like Amazon. It wouldn’t fit. An ethical, local fit, local economies, would be appropriate”* (Participant B).

There were also concerns about business advertising diluting the ethos of fairness and inclusivity that cultural services are known to promote.

*“If I see a place that’s supposed to be for everybody, but you see a big brand that may not be known for something nice I find it sad and cheap maybe that they’re still able to slap their name on something”* (Participant A).

Despite the evident apprehension, however, the majority of participants were accepting of the need for service to seek alternative fundraising avenues and perceived corporate partnerships as a necessary evil.

*“To some extent it seems wrong because we pay our council tax but there again in the current economic climate I suppose if you can get the money”* (Participant D).

*“They’re contributing to a cause so what if I see their name on something. I still my own rights, so if I don’t want to buy something from them, that’s fine. You have to give credit where it’s due – at least they’re giving something to support something important, and unless you have money to contribute, I would zip it!”* (Participant E).

## **Accountability**

The subject of accountability was a frequently occurring theme in the interviews.

There was a sense of incredulity from some participants, when asked to consider the

concept of generating funds for public services. Each of them expressed views at some point during the interview that they expect the council to finance the services.

*“How good are our local councils at dealing with their finances in order that we have to do this for libraries? It annoys me a bit. It would be nice to think that we know what’s been done. Not be finding out that a library had closed and wondering what the heck had happened to the money”* (Participant G).

*“I get that you want money, but it feels like it’s all being pushed on to the individual to fund it. I would want this to be the responsibility of the council, or the government and I feel that this gets lost”* (Participant A).

The impact of this standpoint led several participants to the conclusion that they would be supportive only of income generation activity that is clearly defined as “extras” and not propping up core services.

*“I don’t think people like to feel that they are giving something which gives established sources of funding an excuse for reducing that element. Donation for a specific thing which you wouldn’t otherwise get is fine, or where the standard service is stretched to accommodate this thing – something you can never find the funding”* (Participant B).

*“If I had extra funding and I knew that £5 or whatever would go to pay for events and stuff, I would be ok with that. I think as soon as it becomes this exclusive arrangement, you’re supporting a weird structure by asking for money for a service that is publicly run”* (Participant A).

Equally as important to participants was the desire to know where and how their donations would be directed. Scepticism about the management of public finances was apparent, with indications that it would be difficult to sustain support for income generation activity in the longer term, and a fear that donations would not be directed to the causes they are intended to support.

*“I think there’s a danger, particularly in current financial situation, that you do all these things, and it just goes into a pit and after a time you would find less enthusiasm for doing those things if it wasn’t directly tied to the building and the collection”* (Participant F).



*“People would want to know how the profits would be ringfenced. I think a question would be about making sure their money wasn’t propping up bin collections”* (Participant I).

On this matter, the final question concerning development trusts was of particular interest, and an understanding that a trust would help avoid this issue was welcomed. However, questions concerning accountability for managing the trust would also need to be answered.

*“How would these things be vetted as to where the money is going? That’s the side of things I’d want to make sure is clear. You would have to have somebody doing the accounts and it would need to be transparent”* (Participant G).

*“Be prepared to answer tough questions and don’t be secretive. Is it safe in terms of embezzling? Can money go missing? Accountability is important”* (Participant I).

## **Theme 2: Ownership**

A second predominant theme in the data concerns the notion of ownership.

Participants placed particular emphasis on making income generation activity relevant and meaningful, in reference to location and how the offer would fit within the physical space of the museum/library and in the wider locality. Notions of relevance and meaning also in terms of the impact on communities and the importance of connecting activity to people and place.

### **Tailoring the offer**

All contributors, at various points during the interviews, queried the relevance of certain income generation activity within their locality. In conversations about physical space, participants were asked about the appetite for cafes, shops, and

events across StoriPowys, but were largely focused on the feasibility of such initiatives within their immediate area.

*“The ability to tailor it to the location is important”* (Participant B).

*“If you’re going to entertain the idea you need to think about size of space, footfall, etc. Start small and see what happens maybe?”* (Participant G).

Some participants were conscious of competition from local businesses and were unconvinced about the profitability of StoriPowys-run cafes and shops in areas where there were already a significant number of similar offers. Solutions that were presented highlighted the need to develop niche offers that would set StoriPowys apart from the competition, with an emphasis on selling merchandise and services that either promote museum and library merchandise, or by meeting community needs that may be lacking in a particular area.

*“You’d be on a difficult wicket if you trying to sell things that were markedly different from things that you might associate with a library or museum/art gallery”* (Participant B).

*“Take the idea of the idea of the café and try to extend it, particularly encourage local authority workers to use it and I think you have a chance of success”* (Participant C).

*“They need to organise hands on community things, like a writing workshop, and I’d pay for sessions. Or a sewing group – there’s only one person in Brecon who does that”* (Participant E).

There was acknowledgement from several participants about the rurality of Powys, and the viability of sustainable, commercial activity in areas where footfall is likely to be low, or where the distance to travel to a facility may be a disincentive for residents.

*“Some of the rural libraries - how many people would make an effort to drive there just to go to the café?”* (Participant I).

The same considerations were expressed when participants were asked to consider their preference for countywide versus local friends' groups and StoriPowys membership.

*"I would want to see that the money I was spending ideally going into the kitty for that library, but it would be acceptable if it went into the kitty for all of Powys libraries. It would be better for me if it stayed local. It's such a rural area so especially so"* (Participant A).

*"A countywide friends would seem more daunting. I would feel like if I'd raised £500, for example, it would mean more to raise for something local as it wouldn't mean much if going to all those libraries"* (Participant J).

## **Community**

An extension of this local element concerns Community, and this appeared frequently in the data. Interviewees' language conveyed a sense of ownership about StoriPowys, particularly when conversing about their local facility, with phrases such as "our museum" and "my library" featuring as common occurrences in the transcripts. Community is a strong theme in terms of benefits and impact, which is addressed later in the findings, but its relevance in this section relates specifically to the connection it has for participants with their sense of place.

Conversations around both online and in-person fundraising activity highlighted the distinction between benefits to residents as individuals and benefits to them as part of a wider community, with the latter being an essential partnership to guarantee ongoing service sustainability that extends beyond income generation alone. All participants could see the potential of Friends groups to raise funds but were mindful also of the need ensure that endeavours have a visible impact on their local communities.

*“Yeah, donating to a local library and the way that library operates within that local community, I think that has a chance” (Participant C).*

*“As far as income generation, I think people would be up for that as an interesting thing that they can do without having to go to Cardiff or whatever” (Participant G).*

*“I think there’s a case for libraries taking on roles of things like post offices so a linked up whole monies piece, particularly as they’re disappearing from their communities” (Participant C).*

They also saw value in the importance of the mutual benefits for service and communities, to ensure longevity of libraries and museum services by highlighting the support that each can offer the other.

*“You’re looking to attract that element of people who are prepared to be community minded in helping to support a service which is just this little bit better by them being a friend” (Participant B)*

*“It’s good for the community to see that people want libraries to do well and older people would find it reassuring that younger generations want to support” (Participant J).*

When considering corporate support of StoriPowys services, more than half of participants were keen that partner companies are either community-based or promote community development as part of their corporate social responsibility.

*“I would appreciate local company more. Knowing that a small business could get their name out there would mean more as they’re investing in their own community, but a big company would have more money to throw around but wouldn’t care” (Participant A).*

## **Local culture**

A desire to preserve and promote the history and culture of Powys came through clearly from participants. As Powys is a popular tourist destination, residents are aware of the significant visitor demographic that this brings and evidence of interviewees’ pride in their heritage and their desire to publicize this to the wider world was evident.

There was a consensus on the need to capitalize on the museum collections to generate income, and to appeal to tourists with merchandise that not only has a unique selling point but promotes the culture of Powys to those from further afield.

*“People like to take reminders away, of something you’re proud of if you live in Brecon – a reminder of Brecon. It might not be the logo but something more characteristic of Brecon”* (Participant B).

*“A simple logo is fine for pencils or rulers, clean and nice. But museum notebooks having pictures is a good opportunity to have something unique, and a better reminder of the experience”* (Participant J).

A passion for locals to learn more about their own culture also featured a great deal in the data, and there was a clear appetite from participants to pay for unique online content or in-person experiences from StoriPowys museum and archive collections that they would not otherwise have access to.

*“I think you’re up against such a large spectrum of other things that are free online. Something very specific could work – a history of Llandrindod by the local history society”* (Participant B).

*“What I would pay for is you telling me the story. So, in other words, if there was a series of online events, particularly telling me about what the archives would hold, then yes, I would pay”* (Participant C).

There was also recognition of the significant number of creators living in Powys, and the idea of supporting local artists and culture while generating income was a suggestion that several participants put forward.

*“Something from local creators would be good, pop-up shops for local artists. It’s important to support local culture in Wales too”* (Participant J).

*“Could you get non-branded things from local craftspeople? I’d probably like to see local crafts”* (Participant H).

### **Theme 3: Engagement**

The appetite for income generation activity was accompanied by themes around engagement with the public. This is the largest of the three themes, elements of which have already been picked up in other sections of the analysis. However, a substantial amount of data captured in this area warrants further analysis as standalone categories.

Participants were consciously contributing to discussions from the perspective of StoriPowys facilities and services as primarily public services, rather than commercial enterprises, and from that standpoint themes concerning benefits and outcomes for the public and for the service, as well a recognition that the target audience for these benefits, is broad. Accompanying this were comments and observations around the communication of fundraising initiatives to this audience.

## **Benefits and Outcomes**

Benefits to the public were high on the agenda for participants. Rather than advantages to the individual, it was benefits to the wider community that participants were most interested in; commercial activity that had either the knock-on effect of improving services access to cultural services for communities, or an appetite for fundraising that would, in some other way, be for the benefit of the greater good.

When asked discussing the possibility of StoriPowys shops and cafes, what appealed to some participants was the idea that it could be used as a vehicle for meeting a social need.

*“I like the idea that the shop would be giving a certain amount of the spotlight to the pieces that would generate money into funding something. I would like to see the money going somewhere” Participant A).*

The current economic cost-of-living crisis was also highlighted.

*“Thinking of people who can’t keep their own houses as warm so you’re looking for a comfortable place where people will be for a long period of time, the idea of having a café is important” (Participant B).*

One participant saw the value in extending the café offer to run paid workshops that would teach people valuable life skills and partnering with local businesses to deliver a viable offer.

*“I wouldn’t mind having workshops and paying for those, so I don’t have to travel, as long as it’s not expensive. We need to work together, to give back – work with local bakeries, people. It would be nice to do it in my own community. I would support activities in towns” (Participant E).*

The question concerning charges for online events generated some interesting observations. Most participants were supportive of a flat rate for event tickets, but there were some thoughtful, and varied, comments about the social impact, factoring in the benefits for the consumer, the content creator or service and adopting a pay-it-forward approach.

*“If it’s something different ‘d pay, like a talk. Reminding the viewer that we should support the struggling artist. E.g., buying a cd is important as it makes a difference, even if you can get it on YouTube” (Participant A).*

*“A small charge, and anything above would depend on the person. I like the idea of pay what you can. Like pop-up cafes, this is the amount, but pay over or under and if you pay over it will pay for someone else’s dinner” (Participant A).*

*“Offer incentives for people to come to the facility to pick up a craft kit for an online course (it’s cheaper if they collect) and take the opportunity to promote the shop, increase footfall etc.” (Participant I).*

A perspective that a few contributors brought, was the potential for improved access to physical spaces. They queried whether events hosted at StoriPowys sites out of hours could provide the opportunity to extend library and museum opening hours, so

that at least some services could be available when events were running, and the idea that a paid event may facilitate this was welcomed by participants.

*“I think some of these buildings that are empty, Powys council should either convert or be used”* (Participant E).

There was a recognition from some participants that visible benefits to StoriPowys are vital and understanding that continued and increased use of services is as essential to sustainability as the funds to keep them afloat. The positive impact of online fundraising engagement was mentioned by some participants, who saw the benefits of online engagement not just in terms of generating funds, but also in its capacity to develop relationships and drive in-person visitor numbers.

*“If I saw something from the library online it would make me want to look. It might not make me want to donate if I don’t already go to the library and don’t have spare money. Use it as an advert and if you get more visitors”* (Participant E).

*“Offer incentives for people to come to the facility to pick up a craft kit for an online course (plus it’s cheaper if they collect) and take the opportunity to promote the shop and increase footfall”* (Participant I).

There was a similar outlook when considering the potential for paid StoriPowys membership packages.

*“It would need to be more than a newsletter. Benefits attract members - not necessarily daily but welcome ones. Some benefits might make you visit the facility, stay longer, spend in the café”* (Participant I)

Some feedback was linked to more strategic thinking about benefits and outcomes, with comments that any fundraising activity should be carefully planned and executed, with full understanding of the risks, the implications, and the desired results, rather than taking a scattergun approach.



*“It’s a conscious decision – we’re doing this because we need the money to keep the lights on, or we need a piece of equipment, or highlighting an aspect of the collection – thinking about benefit, impact, etc” (Participant F).*

*“The council’s policy is to encourage income generation related to tourism, that’s absolutely important that you’re tying back income generation policies in your libraries and museums to particular elements of the council’s policy” (Participant B).*

A similar perspective was presented during conversations about Friends groups, and one participant spoke of their previous involvement with a friends of a library group, where the purpose was to raise the library’s profile with local politicians, as well as raising funds.

*“There’s a political element to it – we want to save the library and make sure it has a growing future and not a declining one” (Participant C).*

Within the data, there is also evidence of what participants feel may add very little value. There were mixed views about the appetite for general online fundraising activity, but on the question of crowdfunding, and whether a reward- or donation-based approach would be preferred, 8 of the interviewees agreed that a reward for financial contributions was either unwanted or likely to be too ambitious for staff to manage.

*“If you feel that something is worth having, you’d need to have a pretty significant reward and a lot of people don’t want the clutter. In general, I’d rather pay for the cause” (Participant B).*

*“If I did donate, I wouldn’t want anything in return. If I had something in return, I would be wondering whether I’m doing it for my sake or for theirs. A donation is technically supposed to be a one-way thing, so if you donate and get something in return, you’re technically buying something. Transparency, no strings attached” (Participant A).*

Important to participants was the cost versus benefits of staff output, linked to previous observations about the impact on service provision when human resources are spread too thin.

*“I can’t see myself buying something like that really. I think it’s a waste of resource. What’s it adding rather than taking up someone’s time and creating more waste in the world? No, I don’t understand it”* (Participant I).

## **Communication**

Whilst a notional/abstract theme of communication cuts across other themes, analysis of the data has also identified this as a sub-theme in its own right, due to the specific nature of participant feedback.

An important point that has been picked up in the section on Accountability addressed the desire for the public to feel confident that any money they choose to invest in the services are spent on the cause at hand. Participants felt that communication of this should go beyond simple assurances, and there was clear evidence in the data that clarity was needed on how, where, and why the money would be spent.

*“This pot of money – it would be a specific thing you’re doing, and I would have no objection. It would be about communicating why you’re charging and where the money is going”* (Participant H).

*“It’s a bit like taxation really. We all pay into general taxation but the bit that we quite like is the bit where we know where the money is actually going. So, if my money can go to that particular service then yeah”* (Participant C).

Some participants felt strongly that communication was needed to convey to the public what they are at risk of losing if they choose not to make financial contributions. An absence of understanding of the machinations of local government, and the lack of influence that StoriPowys staff have to garner financial support from senior officials came as a surprise to several interviewees.

*“Instead of donations could you have lists? Campaigns to save the library etc?”* (Participant A).

Those that did have some understanding felt that the service could and should turn it to their advantage when communicating the difficulties.

*“I would imagine there would be people keen to support culture and understand the financial threats, so it would be an important selling point if you could give a guarantee that the money would be ploughed back in”* (Participant J).

*“Even if some things are a nominal fee, it all helps. It's a bad time to be asking people for money but important to stress that the alternative might be to have nothing, forever”* (Participant J, Q.6).

When asked about membership and friends' groups, most were open to the idea, provided there was something to make the commitment worthwhile, but 4 of them expressed confusion about the StoriPowys brand, and the vision, and the broadness of its cultural services offer in both a geographical and theoretical sense.

*“It depends what you're looking for - am I supporting my local library or local history and culture in Powys?”* (Participant J).

*“I think understanding enough about StoriPowys and what it's saying to people in the county and how easy it is to access, how it engages me. It's more complicated because it's Powys”* (Participant F)

There was a similar comment too in relation to branding and general online presence, and the difficulty for cultural organisations such as StoriPowys in making themselves relevant and distinct from the overarching council, where cultural engagement is just one aspect of its broader public communications and therefore somewhat lost.

*“It's about consistency of message and I think you've got a challenge because you're under Powys, you've got to go through several layers to find what's underneath”* (Participant F).

## **Audience**

The main aspect of this theme is the distinction that participants regularly made between either a local resident and a tourist, or a library customer and a museum visitor. Differences between the museum and library audiences were evident.

Participants emphasised the social need that they felt should be met with fundraising activity in a library setting; cafes were imagined very differently in libraries to those in museums, and responses were mindful of the local element and concerned that activity should not impact negatively on the library service offer.

*“A library café should have again the separation. Consider the quality of the customer experience for those wanting peace” (Participant J).*

*“A library is somewhere where almost everybody would go at some point and it’s much more; it’s got the opportunity with a café to become a social setting, more casual in a library than a museum” Participant I).*

There were additional observations about the appropriateness of shops in a library-only setting, that there would not be a unique selling point with which to target the library audience.

*“I’m just not sure about the feasibility – people go to browse the books etc and I don’t know whether it would work” (Participant H).*

Other participants saw more potential for shops and cafes meeting the demands of both library customers and museum visitors, provided the product range catered to both audiences.

*“I would focus a library shop on the types of people using them, so students and pens, stationery” (Participant I)*

*“I think you can manage both audiences but it’s about quality and display and also about ease of purchase – transaction but also speed of someone taking your money. Invest in the visitor experience” (Participant F).*

When considering the out-of-town visitors, participants saw value in capitalizing on the StoriPowys collections. Linking to the sense of place and the story of Powys theme that was covered in a previous section, promotion of the cultural experience was seen as an opportunity not to be missed.

*“Just thinking about our area – what Powys is about and what it’s like. Not many of us, so your audience is probably people from away, who love the picture postcard view of Welsh rural life. You might also want to attract the hiraeth bit, the people who have the longing, from the smoke or somewhere – tapping into that visitor experience rather than the locals”* (Participant C).

Another angle presented was the element of buy-in to Friends groups and membership initiatives, activities that required ongoing commitment in terms of time or money. The views presented highlight a challenge for StoriPowys in meeting the needs of a broad audience, and that factors of individuals’ interests and personal circumstances need to be considered when seeking ongoing support.

*“I feel that libraries are different from archives and museums and wouldn’t be comfortable being a friend of Powys Cultural services”* (Participant B).

*“I’m talking as a pensioner. There are people who are happy to help a lot but not want to commit all the time or when it rains, or in winter, etc. You have to know you can give the commitment”* (Participant G).

Several comments around affordability showed recognition of the current economic climate. There were general observations that any café in a museum could feasibly charge more by targeting the tourist market, but overall, the contributors were mindful of financial pressures on people and advised caution when setting prices for local audiences, whether on- or offline.

*“You’ve got to be focused on the market which you’re trying to develop. There’s a place for a number of high-quality items but also a place for more affordable items so that’s an important facet to build into your own conclusions”* (Participant B).

*“Whatever we do outside of normal things to live is a luxury, so if people don’t have it to spend on food, they won’t be able to give anything. You have to figure out the market – if it’s a niche group I would just charge a fee”* (Participant E, Q).

*“I understand your concepts and in a different time this was possible when money was abundant but now the world has changed; after Covid it crashed the economy. We live in a different time now and we need to adjust”* (Participant E).

In discussions about online income generating activity, the absence of data was equally as telling as that in more detailed transcripts. 4 of the participants were either lacking in confidence with, or not interested in, online participation, which provides a snapshot of a significant, largely older, demographic who would prefer not to engage online. 2 of the participants were reluctant to enter into extended conversations about online fundraising, despite explanations and examples being provided.

*“I don’t engage like that online. I think I’d rather see my attention drawn to it in other ways. Only because I’m old school”*. (Participant G).

*“To be honest, I’m not a fan of social media, and that’s perhaps an age thing”* (Participant C).

Others made similar comments but conceded that there was value in pursuing this avenue of enquiry with those that may have more to contribute.

*“I think you’d need to research in more depth with the age group that’s more geared up to social media use”* (Participant B).

*“I wouldn’t respond but there again someone who’s younger might well do because their phones are like computers in your hands. I wouldn’t but you need to ask people who use it”* (Participant D).

More than lack of interest, there was clear evidence of a fear of technology, which would pose barriers to online engagement with potentially a significant segment of the audience.

*“I don’t put much info on the internet for security reason. I’ve donated to a food charity via an envelope. Companies asking for info and setting up direct debits, it wouldn’t attract me”* (Participant E).

*“I would want to see where the money was going, obviously, and how safe would my account be and how easy would it be for people to access my details, that always worries me” (Participant H).*

## **Discussion**

### **Introduction**

This chapter interprets the themes arising from the results and analysis of the semi-structured interview research and discusses their significance in relation to the literature previously reviewed. The chapter begins with an examination of the overall aim of this research: to investigate how income generating activities in the cultural sector can be used to develop an income generation strategy for Powys County Council’s cultural services. Discussion of the results seeks to answer the research questions posed, which concern the implementation of income generation activities in StoriPowys that have proven successful elsewhere. This is examined in the context of strategic direction, the changing digital landscape, and sustainability.

### **Interpretation of results**

#### **Theme 1: Service delivery and principles**

The theme of impact on service delivery was recurrent in interviews, and from both a museum and library perspective there were concerns that commercial activity may reduce access to, and standard of, core public services. Some comments were born out of a misapprehension that commercial endeavours would require facilities completely to shut down to accommodate them, but there were also valid concerns about restricting access to certain spaces and collections, which would need to be

carefully managed. Concerns about staff capacity were a big factor in discussions, and participants seemed worried that focusing on raising funds would detract from the main staff objective of delivering an efficient library and museum service.

*“As a mum making an effort to take my kids to a rural library, I’d be cross if my ability to use the service was impacted”* (Participant I).

*“There is an expectation of a minimum level of service which staff in a public service institution are expected to deliver. Be careful about crowding out their ability to perform that basic service”* (Participant A).

These concerns were evident in the literature review also, and interview data confirms findings elsewhere that a balance needs to be found with commercial versus service activity, so that the former does not come at the expense of the latter (Miguel, 2022; Share Museums East, 2018).

Interestingly, it was only staff capacity, and not capability, which featured in the interviews, whereas academic investigation uncovered themes around staff skills and attitudes (TBR, 2015, p. 26; Museums Association, 2020, pp. 20-21), where it was clear that strategic planning should prioritise the development of an entrepreneurial workforce and culture to ensure sustainable fundraising practice. It is important for strategy planning that the qualitative data captured from StoriPowys customers and supporters is complemented by a staff perspective also, and research in this area will be required.

Another thing that did not appear significantly in the literature, but came up frequently in interviews, was the theme of accountability. Existing literature is largely focused on the service perspective and lacks the consumer viewpoint. An aspect that did feature in the literature was surrounding the topic of corporate sponsorship,



which highlighted the ethical considerations of entering into corporate partnerships (Biraglia & Gerrath, 2021, Wang & Holznagel, 2021). Participants shared these views, citing the need to preserve the library ethos of fairness and impartiality, but they could also see that it was necessary for the service to consider alternative fundraising models.

*“I guess a lot will be out for what they can get. It’s just what you have to do these days. It would need to be ethical”* (Participant G, Q.4).

Accountability was a clearly apparent theme in interviews, primarily concerning questions of how, or whether, raised funds would be used. As taxpaying residents of Powys, participants were understandably preoccupied with questions about why the council was adequately financing cultural services and what guarantees could be given about the reinvestments of funds back into the services the money is being raised for.

*“People would want to know how the profits would be ringfenced. I think a question would be about making sure their money wasn’t propping up bin collections”* (Participant I).

Discussions about Development Trusts were of interest in this regard, and participants were keen to support this development if it allowed for the ringfencing of income, provided that there was accountability with the trust too. Academic literature supports this viewpoint (Wilcox, 1998) although information is scarce.

*“How would these things be vetted as to where the money is going? That’s the side of things I’d want to make sure is clear. You would have to have somebody doing the accounts and it would need to be transparent”* (Participant G).

It is possible that a fear of the unknown is a so a contributing factor to any resistance to ideas of commercial activity, as partnering with business, for example, is not

commonplace in public cultural services. It may also tie in with the challenges that appeared in the data, that there is a lack of understanding of how public finances are managed. Successful, sustainable commercial endeavours of any sort would need to provide clarity on why there would be a need for them, and to ensure that the protection of core services remained central to service objectives.

## **Theme 2: Ownership**

A sense of place and ownership emerged from the data. Participants were all from around Powys, each a regular supporter of their nearest library, museum or both, and each brought a somewhat different perspective based on their own interests and their community. There were those that observed the practical, logistical aspects of introducing income generation activity in their local facility and that there is no one-size-fits all approach to the introduction of cafes, shops and the like.

*“If you’re going to entertain the idea you need to think about size of space, footfall, etc. Start small and see what happens maybe?” (Participant G).*

This goes some way to explaining the predominance of grassroots activities in libraries that was discovered in the literature, where library staff have learned to be creative with the resources they have within their community setting, as in some places a more sophisticated commercial offer may just not be viable.

Those that lived in more rural locations near libraries with relatively low footfall were more sceptical about feasibility of shops, cafes, and events than those in busy towns, or where museums were concerned. However, the consensus was to support such activity, as long it is manageable, and the advantages of adapting unique

spaces for these purposes was recognised. This fits with the myriad examples of events and cafes hosted at museum and library facilities that can be found in the literature review (Australian National Maritime Museum, 2022; Kitchener Public Library, 2022).

A focus for participants was also very much on community, and participants were thoughtful about what was needed in their local area and meeting those needs by creating relevant and meaningful opportunity.

*“Take the idea of the idea of the café and try to extend it, particularly encourage local authority workers to use it and I think you have a chance of success” (Participant C).*

*“They need to organise hands on community things, like a writing workshop, and I’d pay for sessions. Or a sewing group – there’s only one person in Brecon who does that” (Participant E).*

This aligns with literature review findings, and the argument for councils aligning entrepreneurial activity with local value creation (Mills et al., 2021).

The community thread carried through other aspects of the interview discussion. There was a clear appetite for creating synergy between the organisation and the community, and a sense that cocreation and collaboration could bring benefits for both. This was notable in discussions about Friends groups. Some participants had experience of such groups and were able to bring a first-hand perspective to the conversation.

*“You’re looking to attract that element of people who are prepared to be community minded in helping to support a service which is just this little bit better by them being a friend” (Participant B)*

There was also a demand for alignment when considering corporate support, and the impression was given that supporting a business partnership would be more

palatable if that company were to be working in the community, be evidencing benefits on a local level. Academic literature supports this approach Tysiac (2016, p. 36), as do the examples detailed in the literature review, however, due to limited research in this area a cautious approach with corporate partnerships is warranted. A wariness expressed by participants may extend to the wider community and next steps for StoriPowys would need to be carefully considered.

Another aspect to the theme of ownership addresses the story of Powys, and participants demonstrated an understanding of the rich culture of Powys and the meaning that both residents and tourists attach to it. They showed a desire to learn more about the history and heritage of the county and saw the potential in showcasing it to the wider world. Importantly for the research, there was a shared view that this story of Powys was something that could be monetised.

*“What I would pay for Is you telling me the story. So, in other words, if there was a series of online events, particularly telling me about what the archives would hold, then yes, I would pay”* (Participant C).

The value in promoting Powys’ culture was prevalent in discussion about online activity, where the benefits to both tourists and locals could be seen and the uniqueness of the StoriPowys collections could provide an edge when competing with other online content. The same was true of merchandising, and a unique offer with a local flavour was suggested as something that would have a broad appeal. The advantages of having a unique selling point (USP) appears frequently in the literature, from driving online engagement (American Alliance of Museums, 2020; Jin and Min, 2021, pp. 35-36) to development of a commercial brand identity (Mitsitam Café, 2022). The appeal of Powys as a tourist destination is something that could be developed, however the development of well-researched content for an online

audience is likely to be labour intensive, and the cost-benefit of undertaking this as an income generator would need to be carefully calculated.

### **Theme 3: Engagement**

Engagement was a theme that featured significantly in the data, particularly concerning the perceived benefits to the community. Whilst the appetite for income generation activity was largely positive, all participants were keen that such activity should provide tangible benefits to the community. It is important to acknowledge that interviews were conducted against a backdrop of enormous cost-of-living pressures, coupled with an uncertainty about how communities would recover from the social and economic impact of the Covid-19 pandemic. Participants were mindful of this when considering commercial pursuits, as is evident in the transcripts, with an emphasis placed on initiatives that meet a social need, as well as supporting local economies.

*“We need to work together, to give back – work with local bakeries, people. It would be nice to do it in my own community. I would support activities in towns”* (Participant E).

It accords with evidence in the professional literature, which highlights the potential for cafes and shops in rural, cultural settings as vehicles for the regeneration of these local economies post-pandemic as drivers of footfall to towns and villages (Arts Council England, 2020). The social value created when income generation activity is coupled with meeting a community need encourages advocacy for services, which is essential to sustainable practice (Peet, 2016). It all suggests that a symbiosis between social value creation and fundraising is critical when responding

to research questions concerning service strategy and sustainability, signifying that StoriPowys should not be looking at a traditional retail business models when considering future developments.

Most respondents were keen that a StoriPowys membership should come with benefits, provided that added meaningful value, but with successful models focused on larger organisations, and concerns about staff capacity highlighted in the literature (Miguel, 2022), more research would be needed to determine the feasibility of this in Powys.

Participants could see the value in online activity to further drive in-person footfall, which supports the literature findings that online campaigns are an essential communication tool in fundraising strategy (Museum Next, 2022), and even participants who showed more reluctance to engage online could see the value in it as a way of reaching a wider audience.

*“If I saw something from the library online it would make me want to look. It might not make me want to donate if I don’t already go to the library and don’t have spare money. Use it as an advert and if you get more visitors”* (Participant E, Q.5).

*“Offer incentives for people to come to the facility to pick up a craft kit for an online course (plus it’s cheaper if they collect) and take the opportunity to promote the shop and increase footfall”* (Participant I, Q.6).

On the theme of communication, there was some cynicism from participants regarding the accountability of funds, as identified in a previous section. It is conceivable that a history of well-documented reductions in public library and museum services across the UK has led to a degree of scepticism and distrust where the funding of cultural services is concerned, and a strong desire for not only assurances, but also communication of clear objectives for reinvestment of funds raised.

An interesting observation from one participant about making “conscious decisions” (Participant F) as opposed to a scattergun approach when fundraising, has been picked up in the literature review, yet mostly in reference to low-key grassroots activity (GoFundMe, 2021), and it is conceivable that a strategic decision to deliver sustained income raising activity with SMART (Specific, Measurable, Achievable, Relevant and Time-bound) targets is more likely to achieve financial sustainability than ad hoc activity.

A potential challenge to fundraising that emerged from interview data was the distinction that participants made between the library customer and museum visitor. Academic and professional literature reviewed considers either library or museum settings, rather than both, and findings from organisations that successfully navigate both audiences would be welcome. It is evident in participation feedback that catering to each audience would be different, with an emphasis on social value creation for the local customer, and a more directly commercial offer for the visitor market.

*“A library café should have again the separation. Consider the quality of the customer experience for those wanting peace” (Participant J).*

*“You might also want to attract the hiraeth bit, the people who have the longing, from the smoke or somewhere – tapping into that visitor experience rather than the locals” (Participant C).*

Participants were more protective of the library environment, keen to preserve the status quo and not lose sight of its core purpose, and a more cautious approach to the introduction and communication of income generation initiatives in a library environment would be warranted. A StoriPowys income generation strategy will need to incorporate plans that cater to both audiences, which might consider different marketing and pricing models. Current financial pressures highlighted by participants

makes a pricing strategy something that must be carefully mapped out to avoid alienating the local audience whilst catering to the tourist market.

There were areas, however, where both audiences could be catered to, particularly in the arena of online activity, and interviewees could see value in the use of virtual experiences to share the culture of Powys with locals and tourists alike. The local Powys audience has challenges shared with most rural areas, where availability of public transport, access to culture and social activity is more restricted than in urban areas, and there was a willingness from participants to pay for online cultural experiences where distance to physical locations prohibits easy access. Academic literature on the benefits on the use of technology to promote culture during Covid lockdown correlates with the views of participants (Jin and Min, 2021, pp. 35-36).

Notwithstanding the potential that could be seen in digital developments, the reluctance that some participants displayed when discussing online engagement cannot be downplayed.

*“I don’t engage like that online. I think I’d rather see my attention drawn to it in other ways. Only because I’m old school”.* (Participant G).

*“I don’t put much info on the internet for security reason. I’ve donated to a food charity via an envelope. Companies asking for info and setting up direct debits, it wouldn’t attract me”* (Participant E).

A significant number of StoriPowys library customers are not confident with emerging technologies, and future, sustainable developments must consider how it caters to an audience that lacks IT literacy and meets their needs as technology continues to rapidly evolve.



## **Conclusion**

## **Introduction**

This chapter will conclude the investigation by summarising the key research findings in relation to the research aims and questions and discussing the value and contribution thereof. A reflection on limitations of the study will follow, and proposed opportunities for future research.

## **Key Findings**

The main purpose of this study was to investigate income generation activity in cultural services worldwide, with aim of research findings informing an income generation strategy for StoriPowys. A review of academic and professional literature, coupled with data from semi-structured interviews, has been used to respond to the research questions posed.

### **RQ1 What strategies are implemented by local government and not for profit organisations that fundraise successfully?**

A review of the literature identified several strategies that were deemed essential to success, focusing primarily on the development of an entrepreneurial workforce, with adequate skills and capacity to deliver new innovations, although it was acknowledged that a lack of capacity was not so easily overcome. Case studies reviewed pointed to success by means of a holistic approach to fundraising, working with communities and volunteer groups to obtain buy-in, and to achieve financial success alongside public value creation.

## **RQ2 How are new technologies altering the fundraising landscape?**

A review of the literature indicates that online engagement with audiences in the cultural sector increased rapidly in response to the Covid-19 pandemic, and evidence has yet to emerge on the long-term impact of this on donor-giving habits. Examples of monetised content, online events and crowdfunding suggest that the public are willing to engage with, and pay for, unique online content. However, as it is the younger generation that engages more in this way, the online approach needs to be balanced with in-person experiences.

## **RQ3 How sustainable are these successful models?**

Linking back to strategy, research suggests that sustainability depends on an innovative and entrepreneurial workforce, with the skills and the means to deliver on the ambition. In the current economic climate, there is no guarantee of continued funding for public sector libraries and museums, so an agile, adaptive workforce is more important than ever. Further evidence ties back to the idea of public value creation, and sustainability through community collaboration, strategic partnerships and generating social benefit as well as financial gain.

## **RQ4 What is the appetite for, and feasibility of, implementing these successful initiatives in Powys?**

Interview respondents were largely supportive of the income generation initiatives discussed and recognised the need to explore these options. However, there were doubts about staff's capacity to implement them, and concerns that core service

provision would be reduced in the process. There were also concerns about accountability for funds raised, and solutions that allowed for the ringfencing of income was welcomed.

The idea of public value creation was felt keenly by interview participants, and the appetite for investing in new initiatives was welcomed, provided it met with a social return on their investment. Commercial offers such as cafes and shops were viewed in the context of locality, rurality, and community, where a tailored approach was deemed appropriate.

There were mixed views from participants regarding interaction with online activity, and although all could see the benefits for those that were comfortable with digital engagement, the data suggests that the StoriPowys consumer demographic is skewed to the older, less digitally savvy, audience, and for StoriPowys to invest in developing online fundraising initiatives, it would need to weigh up the cost versus benefit of doing so.

Interview data highlighted the distinct customer and visitor audiences that StoriPowys caters to, and evidence suggested that the service should be giving equal weight to both audiences if sustainable, effective fundraising were to be achieved. The potential for catering to tourists both on- and offline was viewed as an income generator by respondents. In addition, the uniqueness of Powys' heritage, culture and museum/archive collections were seen as a unique selling point to be capitalised on.

Finally, the theme of communication underpinned much of the discussion, and appeared frequently in the interview data, indicating that whatever approach to developments is taken, a well-executed communication plan should be integral.

## **Contribution to existing research**

This research contributes to existing literature on the topic of income generation in local government cultural services. The study pulls together existing research across libraries, museums, and archives, and presents a structured response to the question of strategy development in this area. It also presents a perspective from a rural Welsh authority and considers a consumer viewpoint which is currently lacking in existing research. Input from StoriPowys consumers highlights aspects of fundraising in public run cultural services from a customer standpoint. Their knowledge of Powys also provided information-rich data concerning audience participation, which will make a valuable contribution to local authorities exploring responses to similar challenges.

Primary data largely agrees with existing research in the field, although absence of academic and professional literature with which to compare it makes it difficult to draw firm conclusions. The consumer perspective, whilst addressing a gap, does not consider other viewpoints which would provide a more well-rounded study, such as opinion from frontline staff and managers.

## **Limitations**

Limitations of the study were highlighted in an earlier chapter, and addressed issues of samples, researcher bias and time constraints. A further reflection considers the absence of Welsh-speaking participants, largely due to geographical constraints, and the unique perspective that could be sought from consumers based in far-North communities of Powys, where Welsh identity and language feature highly. Study of a

larger sample would better capture the broad range of StoriPowys consumer, and a longer-term investigation may bring new insights from a customer base that is still adapting to life post-Covid.

## **Future Research**

Key challenges within the research relate primarily to the significant gaps in the literature and the newness of the concept of income generation in publicly run cultural services, and more general research is needed to explore this phenomenon. Future research could also narrow the focus of areas of income generation activity, to offer more detailed investigation into each. Areas of priority may be the influence of changing technologies, particularly in the context of post-pandemic audience engagement and its impact on the fundraising landscape. As participant sample was largely skewed to the existing, largely older, customer base, a younger, newer audience may provide more information-rich data regarding online innovations.

The impact of Covid on visitor expectations and library customer needs is still to be determined, and future research should consider the customer and visitor experience, and how current fundraising activity may need to be adapted. Case studies of income generation activity may also warrant a review, to assess their relevance in current times.

Finally, an absence of longer-term success of commercial fundraising activity, including an evaluation of financial data, would be a suggestion for future research.

## **Conclusion**

Professional and academic literature, though scarce, provides evidence of an increasing need for publicly run cultural services to diversify their income streams. Examples of innovative fundraising activity in cultural institutions, coupled with evidence of trends in strategy and sustainable practice, suggests that, whilst challenges exist, the workforce is likely to be increasingly dependent on seeking other sources of income to stay afloat. Advancements in technology will no doubt continue to influence how this will be achieved. For StoriPowys, the contribution to research from consumer interviews will allow the service to develop a sustainable income generation strategy that is tailored to its audience and locality.

## **Recommendations for Income Generation Strategy**

The following key objectives for strategy development are recommended. Actions within each objective are not exhaustive but highlight the key priorities.

Objective 1: Investigation of opportunities for ringfencing earned income.

- Consider the establishment of a service-run Development Trust as an option to achieve this.

Objective 2: Communication Strategy

- Audience market research, to engage a broad spectrum of service users with potential future plans
- Development of a marketing and communications plan for customers and visitors
- Development of a digital marketing plan (as above)

Objective 3: Digital Strategy

- Digital infrastructure developments. Seek opportunities for grant funding to improve user digital experience (to include the acquisition of digital equipment, wireless payment systems)

- Development of an online StoriPowys presence (website, social media channels, access to collections, online shop)

#### Objective 4: Development of a Workforce Strategy

- Programme of leadership capability development, to drive a culture of innovation and adaptability
- Development of staff (and volunteer) entrepreneurial and commercial skills
- Development of staff (and volunteer) media technology skills (use of digital equipment)
- Development of marketing skills, to include digital marketing and social media



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## Appendices

### Appendix 1: Semi-structured Interview Questions

#### Overview for participants

The following questions will seek your opinion on a range of potential income generating initiatives that have been implemented successfully at other museums and libraries across the world. I will give you an overview of each initiative, with some examples, at the start of each question.

For reference, I will be referring to our libraries, museums, and archives under the collective heading of StoriPowys, which is a recently introduced brand-name for our cultural services.

#### Questions:

1. **How receptive would you be to having a special event organised and hosted by StoriPowys?** What other types of paid events might you like to see us host (e.g., music, talks)?
2. **Do you think our facilities should provide cafes?** How might these look?
3. **Would you support a shop in StoriPowys facilities?** Would you be interested in purchasing branded merchandise? What might attract you to a museum/library shop?
4. **How do you feel about corporate support of StoriPowys developments and activities?** Would it matter what type of activity they supported?
5. **Do you think that online opportunities for donating money, as shown in the examples, would encourage you to donate?** What might influence you?
6. **Would you pay to attend any online StoriPowys events or activities, similar to those presented?** Which of these approaches would you find most appealing?
7. **Would you consider making a financial donation to a crowdfunding campaign for StoriPowys?** Which approach would you find more appealing?
8. **Do you think you would pay to be a member of StoriPowys?** Would you want to be rewarded for your financial contribution?
9. **Would you be interested in joining a StoriPowys Friends group to undertake activities similar to those presented in the examples?** Would you find a local group preferable to an overarching Powys-wide group?
10. **Would you be interested in supporting a development trust if one were set up alongside StoriPowys?** Would you consider a Friends group or development trust as having more potential for promoting successful income generation activity in StoriPowys?

A selection of online examples of income generation activity, linked to each of the interview question themes, were shared with participants via a laptop and provided further information about, and clarity on, the concepts and initiatives discussed.

Q1 Examples: [Have your ceremony in Fulham Library | LBHF](#)

[https://www.nationalminingmuseum.com/experience/venue-hire/ Weddings at Central Library | Madison Public Library Special Occasions & Celebrations |](https://www.nationalminingmuseum.com/experience/venue-hire/Weddings-at-Central-Library-Madison-Public-Library-Special-Occasions-&Celebrations-Kitcheener-Public-Library-kpl.org)

[Kitcheener Public Library \(kpl.org\) https://www.sea.museum/whats-on/events/swashbuckling-birthday-parties Birthday Parties at DCL | Douglas County Libraries](https://www.sea.museum/whats-on/events/swashbuckling-birthday-parties)

Q2 Examples: [About Mitsitam Café & Chefs \(mitsitamcafe.com\) The Blender Café is Open | Beloit Public Library \(beloitlibrary.org\)](#)

Q3 Examples: [Support Summer Reading at the Wharton Public Library! Custom Ink Fundraising Cases \(artistorybrands.net\) Alfilo Brands—Dedicate to World's Top Art & Culture Icons](#)

Q4 Examples: [Corporate Support | Brooklyn Public Library \(bklynlibrary.org\) Corporate Support | The New York Public Library \(nypl.org\)](#)

Q5 Examples: [Support the Library | Queens Public Library \(queenslibrary.org\) The best charity social media fundraising campaigns | GoodBox](#)

Q6 Examples: [Louvre Joins Forces with Alibaba to Bring Art to Chinese Consumers \(jingculturecrypto.com\) Support - Steinbeck Center](#)

Q7 Examples: [#fashionandtextilesforever - a Creative & Arts crowdfunding project in London by Fashion and Textile Museum \(crowdfunder.co.uk\) National Museums Liverpool needs your help - a Creative & Arts crowdfunding project in Liverpool by National Museums Liverpool \(crowdfunder.co.uk\)](#)

Q8 Examples: [City Museum | Weirdly Wonderful | Tickets and Memberships City Museum | Weirdly Wonderful | Tickets and Memberships Membership | The New York Public Library \(nypl.org\)](#)

Q9 Examples: [APL's ArtWalk Silent Auction Fundraiser : Alpine Public Library About Friends of the Library \(mountainsidelibrary.org\)](#)

Nichola Farr 1906931

Q10 Examples: [Home | Manchester Central Library Trust](#)  
[\(manchesterlibrarytrust.org\)](#) [Norfolk Museums Development Foundation - Norfolk](#)  
[Museums](#)

## Appendix 2: PG2-E1 Ethics Form



### APPLICATION FOR ETHICAL APPROVAL

**In order for research to result in benefit and minimise risk of harm, it must be conducted ethically. A researcher may not be covered by the University's insurance if ethical approval has not been obtained prior to commencement.**

The University follows the OECD Frascati manual definition of **research activity**: "creative work undertaken on a systematic basis in order to increase the stock of knowledge, including knowledge of man, culture and society, and the use of this stock of knowledge to devise new applications". As such this covers activities undertaken by members of staff, postgraduate research students, and both taught postgraduate and undergraduate students working on dissertations/projects.

The individual undertaking the research activity is known as the "principal researcher".

Ethical approval is not required for routine audits, performance reviews, quality assurance studies, testing within normal educational requirements, and literary or artistic criticism.

**Please read the notes for guidance before completing ALL sections of the form.**

**This form must be completed and approved prior to undertaking any research activity.** Please see Checklist for details of process for different categories of application.

#### SECTION A: About You (Principal Researcher)

Full Name:	Nichola Farr		
Tick all boxes which apply:			
Member of staff:	<input type="checkbox"/>	Student:	<input checked="" type="checkbox"/>
Honorary research fellow:	<input type="checkbox"/>		
Faculty/School/Centre:	School of Business, University of Wales: Trinity Saint David		
Campus:	Carmarthen		
E-mail address:	1906931@student.uwtsd.ac.uk		
Contact Telephone Number:			
<b>For students:</b>			
Student Number:	1906931	Undergraduate	<input type="checkbox"/>

Programme of Study:	Master of Business Administration	Taught Postgraduate	<input checked="" type="checkbox"/>
Director of Studies/Supervisor:	Anthony Burns	Research	<input type="checkbox"/>

**SECTION B: Approval for Research Activity**

Has the research activity received approval in principle? (please check the Guidance Notes as to the appropriate approval process for different levels of research by different categories of individual)	YES	<input checked="" type="checkbox"/>	NO	<input type="checkbox"/>
				<b>Date</b>
If Yes, please indicate source of approval (and date where known):	Research Degrees Committee	<input type="checkbox"/>		
	Faculty Research Committee	<input type="checkbox"/>		
	Other (write in) Anthony Burns – dissertation supervisor	<input checked="" type="checkbox"/>		18.03.22

Approval in principle **must** be obtained from the relevant source prior to seeking ethical approval.

**SECTION C: External Ethical Guidance Materials**

Please list the core ethical guidance documents that have been referred to during the completion of this form (including any discipline-specific codes of research ethics, and also any specific ethical guidance relating to the proposed methodology). Please tick to confirm that your research proposal adheres to these codes and guidelines.	
Research Ethics & Integrity Code of Practice (UWTSD)	<input checked="" type="checkbox"/>
Research Data Management Policy (UWTSD)	<input checked="" type="checkbox"/>
	<input type="checkbox"/>

**SECTION D: External Collaborative Research Activity**

Does the research activity involve collaborators outside of the University?	YES	<input type="checkbox"/>	NO	<input checked="" type="checkbox"/>
If Yes, please provide the name of the external organisation and name and contact details for the main contact person:				
Institution				
Contact person name				
Contact person e-mail address				

**Where research activity is carried out in collaboration with an external organisation**

Does this organisation have its own ethics approval system?	YES	<input type="checkbox"/>	NO	<input checked="" type="checkbox"/>
If Yes, please attach a copy of any final approval (or interim approval) from the organisation				

**SECTION E: Details of Research Activity**

Indicative title:	Income generation in Libraries, Museums and Archives: developing a strategy for StoriPowys		
Proposed start date:	May 2022	Proposed end date:	June 2022
<b>Purpose of research activity (including aims and objectives)</b> Outline the purpose, aims and objectives of the research activity, including key research questions. Show briefly how existing research has informed the proposed activity and explain			



what the research activity will add and how it addresses an area of importance. (Maximum 300 words)

The purpose of the research activity is to determine consumer opinion on the introduction of fundraising initiatives in Powys County Council's cultural services (known as StoriPowys).

The aim is to investigate how income generating activities in the cultural sector can be used to develop an income generation strategy for Powys County Council's cultural services

Objectives are as follows:

1. To critically review relevant literature surrounding income generation activities in cultural and non-profit sectors globally
2. To undertake user surveys and conduct semi-structured interviews with consumers to determine customer opinion on the potential implementation of income generating activities proven successful worldwide
3. To develop an income generation strategy for StoriPowys and roadmap for sustainability

(this box should expand as you type)

### **Proposed methods**

Provide a brief summary of all the methods that **may** be used in the research activity, making it clear what specific techniques may be used. If methods other than those listed in this section are deemed appropriate later, additional ethical approval for those methods will be needed. (Maximum 600 words)

Qualitative research will be undertaken by means of semi-structured interviews with consumers. It is anticipated that 10-15 interviews will be conducted, and each is expected to last approximately 20-30 minutes.

(this box should expand as you type)

<p><b>Location of research activity</b> Identify all locations where research activity will take place.</p>
<p>UK</p> <p>(this box should expand as you type)</p>
<p><b>Research activity outside of the UK</b> If research activity will take place overseas, you are responsible for ensuring that local ethical considerations are complied with and that the relevant permissions are sought. Specify any local guidelines (e.g. from local professional associations/learned societies/universities) that exist and whether these involve any ethical stipulations beyond those usual in the UK (provide details of any licenses or permissions required). Also specify whether there are any specific ethical issues raised by the local context in which the research activity is taking place, for example, particular cultural sensitivities or vulnerabilities of participants.</p>
<p>(this box should expand as you type)</p>

**SECTION F: Scope of Research Activity**

<b>Will the research activity include:</b>	<b>YES</b>	<b>NO</b>
Use of a questionnaire or similar research instrument?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Use of interviews?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Use of diaries?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Participant observation with their knowledge?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Participant observation without their knowledge?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Use of video or audio recording?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Access to personal or confidential information without the participants' specific consent?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Administration of any questions, test stimuli, presentation that may be experienced as physically, mentally or emotionally harmful / offensive?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Performance of any acts which may cause embarrassment or affect self-esteem?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Investigation of participants involved in illegal activities?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Use of procedures that involve deception?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Administration of any substance, agent or placebo?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Working with live vertebrate animals?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Other primary data collection methods, please explain in this box	<input type="checkbox"/>	<input checked="" type="checkbox"/>

If NO to every question, then the research activity is (ethically) low risk and **may** be exempt from **some** of the following sections (please refer to Guidance Notes).

If YES to any question, then no research activity should be undertaken until full ethical approval has been obtained.

**SECTION G: Intended Participants**

<b>Who are the intended participants:</b>	<b>YES</b>	<b>NO</b>
Students or staff at the University?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Adults (over the age of 18 and competent to give consent)?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Vulnerable adults?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Children under 18?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Prisoners?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Young offenders?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Those who could be considered to have a particularly dependent relationship with the investigator or a gatekeeper?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
People engaged in illegal activities?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Others (please identify):	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Participant numbers and source**

Provide an estimate of the expected number of participants. How will you identify participants and how will they be recruited?

Interview participants will be identified by pseudonyms. Approximately 10-15 interviewees will be selected from library activity groups, regular customers and volunteers.

(this box should expand as you type)

<b>Information for participants:</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
Will you describe the main research procedures to participants in advance, so that they are informed about what to expect?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Will you tell participants that their participation is voluntary?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Will you obtain written consent for participation?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Will you explain to participants that refusal to participate in the research will not affect their treatment or education (if relevant)?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
If the research is observational, will you ask participants for their consent to being observed?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Will you tell participants that they may withdraw from the research at any time and for any reason?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
With questionnaires, will you give participants the option of omitting questions they do not want to answer?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Will you tell participants that their data will be treated with full confidentiality and that, if published, it will not be identifiable as theirs?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Will you debrief participants at the end of their participation, in a way appropriate to the type of research undertaken?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If NO to any of above questions, please give an explanation			
(this box should expand as you type)			

<b>Information for participants:</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
Will participants be paid?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Is specialist electrical or other equipment to be used with participants?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Are there any financial or other interests to the investigator or University arising from this study?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Will the research activity involve deliberately misleading participants in any way, or the partial or full concealment of the specific study aims?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
If YES to any question, please provide full details			
(this box should expand as you type)			

**SECTION H: Anticipated Risks**

<p><b>Outline any anticipated risks that may adversely affect any of the participants, the researchers and/or the University, and the steps that will be taken to address them.</b></p>
<p><b>Risks to participants</b>                  For example: emotional distress, financial disclosure, physical harm, transfer of personal data, sensitive organisational information</p>
<ol style="list-style-type: none"> <li>1. Some questions posed to may be of a financial nature, and participants may feel uncomfortable disclosing this information and/or fearful that the information will be made known to others</li> <li>2. Participants may be reluctant to answer questions in environments where the can be overheard by staff or other customers</li> <li>3. Participants may be registered customers with our library services and are likely to be asked questions about existing services on offer. They might have concerns that any negative response they give might be shared with staff, thereby affecting the customer-staff relationship.</li> <li>4. Participants may be concerned about the storage of their data.</li> </ol>
<p>(this box should expand as you type)</p>
<p>If research activity may include sensitive, embarrassing or upsetting topics (e.g. sexual activity, drug use) or issues likely to disclose information requiring further action (e.g. criminal activity), give details of the procedures to deal with these issues, including any support/advice (e.g. helpline numbers) to be offered to participants. Note that where applicable, consent procedures should make it clear that if something potentially or actually illegal is discovered in the course of a project, it may need to be disclosed to the proper authorities</p>
<p>(this box should expand as you type)</p>
<p><b>Risks to investigator</b>                  For example: personal safety, physical harm, emotional distress, risk of accusation of harm/impropriety, conflict of interest</p>
<ol style="list-style-type: none"> <li>1. Interviews conducted in private spaces may cause some concern to personal safety.</li> <li>2. Risk of bias. Interviewees are likely to be known to the researcher and/or staff as customers or volunteers at one of our cultural services facilities and may unconsciously wish to provide answers that fit with what they perceive I may wish to hear. There is also the potential for me to ask leading questions based on information I know about the individual. Either of these scenarios could affect the quality and validity of my research.</li> </ol>
<p>(this box should expand as you type)</p>
<p><b>University/institutional risks</b>                  For example: adverse publicity, financial loss, data protection</p>
<p>Risk of data compliance breach.</p>
<p>(this box should expand as you type)</p>
<p><b>Adverse outcomes</b>                  List measures put in place to limit any adverse effects or outcomes of research activity where appropriate. Include any emergency protocols.</p>
<ol style="list-style-type: none"> <li>1. Participants will be advised of the nature of the questions in writing ahead of the interview, and again verbally at the outset of the meeting, and will be advised that they will not be expected to share any detail that they would prefer not to disclose. They will also be advised</li> </ol>

of the process for ensuring anonymity and data protection. Online questionnaires will also detail the same information before the first question.

2. All interviews will be conducted in private meeting spaces at a library/museum/archive site. To avoid risk of participants feeling uncomfortable attending an unsupervised interview, they will be advised of the meeting set-up ahead of the agreed date and notified that they will be able to sign in/out on arrival/departure, and that other staff in the building will be aware of their visit. Participants will have the option to agree the location of the interview before their visit. I have an enhanced DBS check that covers children and vulnerable adults, however neither of these groups will be approached for participation.
3. Participants will be advised in writing, and verbally, of confidentiality measures in place and the protection of their data. All personal information about registered customers is protected by Powys County Council's data protection regulations, in line with national GDPR guidance.
4. Meetings will not be conducted on days where no other members of staff are present on site, and colleagues will be notified of the arrival/departure of participants and of the space where the interview will be conducted. Careline alarm systems are in place at all facilities, which allow staff (me) to raise an alarm if any threat is perceived.
5. Mitigation of bias will be met through adherence to best practice guidelines in academic research.
6. Risks to the university will be mitigated by strict adherence to anonymity and GDPR regulations.

(this box should expand as you type)

<b>Disclosure and Barring Service</b>			
If the research activity involves children or vulnerable adults, a Disclosure and Barring Service (DBS) certificate must be obtained before any contact with such participants.	<b>YES</b>	<b>NO</b>	<b>N/A</b>
Has a DBS certificate been obtained?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

## SECTION I: Feedback, Consent and Confidentiality

<b>Feedback</b> What feedback will be provided to participants, how will this be done and when?
Interview participants will be provided with my contact information and advised to contact me after an agreed date following publication of the research. Alternatively, they will have the option to provide me with their contact details so that I can notify them of outcomes when the research has been concluded. This information will be provided in the form of an email or letter, outlining research findings.
(this box should expand as you type)
<b>Informed consent</b> Describe the arrangements to inform potential participants, before providing consent, of what is involved in participating. Describe the arrangements for participants to provide full consent before data collection begins. If gaining consent in this way is inappropriate, explain how consent will be obtained and recorded.
Potential interview participants will be invited via a regular volunteer newsletter/email if they are registered with us as a volunteer. An overview of arrangements will be included in this, with more detail to follow via email/letter to individuals who express an interest. A similar set-up will apply to potential interviewees who will be sought from our customer group, whereby a printed document outlining the project and arrangements will be made available in our facilities, with my contact details provided for those who would like to find out more.
(this box should expand as you type)
<b>Confidentiality / Anonymity</b> Set out how anonymity of participants and confidentiality will be ensured in any outputs. If anonymity is not being offered, explain why this is the case.
Participants will not be required to provide identifiable information such as name, date or birth or address when answering questions. General information about their local area/library may be requested but they are under no obligation to provide it.
(this box should expand as you type)

## SECTION J: Data Protection and Storage

In completing this section refer to the University's Research Data Management Policy and the extensive resources on the University's Research Data Management web pages (<http://uwtsd.ac.uk/library/research-data-management/>).

	YES	NO
Does the research activity involve personal data (as defined by the Data Protection Act)?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
If YES, provide a description of the data and explain why this data needs to be collected:		
<p>(this box should expand as you type)</p>		
Does it involve sensitive personal data (as defined by the Data Protection Act)?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
If YES, provide a description of the data and explain why this data needs to be collected:		
<p>(this box should expand as you type)</p>		
Will the research activity involve any of the following activities:	YES	NO
Electronic transfer of data in any form?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sharing of data with others at the University?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sharing of data with other organisations?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Export of data outside the European Union or importing of data from outside the UK?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Use of personal addresses, postcodes, faxes, emails or telephone numbers?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Publication of data that might allow identification of individuals?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Use of data management system?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Data archiving?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
If YES to any question, please provide full details, explaining how this will be conducted in accordance with the Data Protection Act (and/or any international equivalent):		
<p>Collected interview data will be anonymised and information will contain nothing of a personal nature that would identify participants.</p> <p>Storage of all data will be cloud-based, stored on my personal OneDrive for Business application within Powys County Council's Microsoft Office 365 account. Data files will be shared only with my dissertation supervisor, via an email link which will allow access for the recipient only.</p> <p>(this box should expand as you type)</p>		



Will the research activity involve storing personal data on one of the following:	YES	NO
Manual files (i.e. in paper form)?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
University computers?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Private company computers?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Home or other personal computers?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Laptop computers/ CDs/ Portable disk-drives/ memory sticks?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
“Cloud” storage or websites?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Other – specify:	<input type="checkbox"/>	<input checked="" type="checkbox"/>
For all stored data, explain the measures in place to ensure data confidentiality, including details of password protection, encryption and anonymisation:		
(this box should expand as you type)		

List all who will have access to the data generated by the research activity:
Principal Researcher Dissertation Supervisor  (this box should expand as you type)
List who will have control of, and act as custodian(s) for, data generated by the research activity:
Principal Researcher  (this box should expand as you type)
Give details of data storage arrangements, including where data will be stored, how long for, and in what form. Will data be archived – if so how and if not why not.
Data will be saved to cloud-based storage on a personal OneDrive application as part of Powys County Council’s Microsoft Office 365 for Business account. This information can only be accessed by myself and is password protected. On completion of the research project the information will be deleted.  (this box should expand as you type)

**SECTION K: Declaration**

The information which I have provided is correct and complete to the best of my knowledge. I have attempted to identify any risks and issues related to the research activity and acknowledge my obligations and the rights of the participants.

In submitting this application I hereby confirm that I undertake to ensure that the above named research activity will meet the University's Research Ethics and Integrity Code of Practice

**Signature of applicant:**

**Date:**

28.03.22

***For students:***

Director of Studies/Supervisor:	Anthony Burns
Signature:	
Date:	27 06 2022

***For staff:***

Head of School/Assistant Dean:	
Signature:	
Date:	

**Checklist:** Please complete the checklist below to ensure that you have completed the form according to the guidelines and attached any required documentation:

<input checked="" type="checkbox"/>	I have read the guidance notes supplied before completing the form.
<input checked="" type="checkbox"/>	I have completed <b>ALL RELEVANT</b> sections of the form in full.
<input checked="" type="checkbox"/>	I confirm that the research activity has received approval in principle
<input type="checkbox"/>	I have attached a copy of final/interim approval from external organisation (where appropriate)
<input checked="" type="checkbox"/>	I understand that it is my responsibility to ensure that the above named research activity will meet the University's Research Ethics and Integrity Code of Practice.
<input checked="" type="checkbox"/>	I understand that before commencing data collection all documents aimed at respondents (including information sheets, consent forms, questionnaires, interview schedules etc.) must be confirmed by the DoS/Supervisor, module tutor or Head of School.

**RESEARCH STUDENTS AND STAFF ONLY**

All communications relating to this application during its processing must be in writing and emailed to [pgresearch@uwtsd.ac.uk](mailto:pgresearch@uwtsd.ac.uk), with the title 'Ethical Approval' followed by your name.

You will be informed of the outcome of your claim by email; therefore it is important that you check your University and personal email accounts regularly.

**STUDENTS ON UNDERGRADUATE OR TAUGHT MASTERS PROGRAMMES** should submit this form (and receive the outcome) via systems explained to you by the supervisor/module leader.

**This form is available electronically from the Academic Office web pages:**

<http://www.uwtsd.ac.uk/academic-office/>

## Application Process

**All staff research projects and all research students** must submit the Ethical Approval Form to the **University Ethics Committee** via the Postgraduate Research office ([pgresearch@uwtsd.ac.uk](mailto:pgresearch@uwtsd.ac.uk)). Staff research directly in relation to personal study for taught undergraduate or Masters programmes should be submitted via the faculty procedures explained below.

**Taught masters and taught undergraduate research Ethical Approval Forms** are considered **within Faculties**. Faculties will provide details of the specific processes for this. Where the Ethical issues within any single ethical application are of particular concern the Faculty will refer these to the University Ethics Committee. Any student activity that involves the collection of primary data needs to undergo Ethical approval, this includes assignment work as well as dissertations.

### Notes for guidance in completion of this form

#### Section A: About You

Please complete all relevant sections

#### Section B: Approval for research activity

Research proposals must be approved in principle before applying for Ethical Approval. The proposal approval only becomes final when the ethical approval is received.

The process for proposal approval varies according the individual and programme of study:

- Research students, by application on form PG1 to the Research Degrees Committee
- Taught students by review of research proposal within Faculties (Faculties provide specific details of these processes)
- Staff, by agreement by the Head of School/Assistant Dean

#### Section C: External Ethical Guidance materials

Many discipline areas are required to operate with the discipline specific codes of research ethics (for example health, psychology, education etc.), any such codes must be listed and you must tick to confirm that you have consulted with these.

#### Section D: External Collaborative Research Activity

Provide details of the external collaborative partners, where appropriate you might want to submit a copy of the external collaboration agreement with the Ethical Approval Form. If the partner requires the research to be subject to its own internal Ethical approval process then please provide details of that process and a copy of any final (or interim) approvals received from the organisation.

#### Section E: Details of Research Activity

Remember that the individuals reviewing this Ethical Approval Form may not have seen your research proposal, and also may not be experts in the specific area of your research. The information provided should therefore be jargon free and clearly stated.

**Indicative Title:** please use the same title as used on the research proposal.

**Purpose:** the Ethical approval process will want to ensure that the methods you propose are adequate and appropriate to address the research aims and objectives. Excessive additional data collection can be seen as unethical.

**Proposed Methods:** the Ethical approval process seeks to ensure that you understand the methods that are intended, and that the implementation of those methods will be appropriate and without unnecessary impact on respondents. Please be specific.

**Location:** this needs to mention geographical location and also local situation (for example, within Local Authority Offices in Cardiff, using a private room but close to other individuals). If you are collecting data within an organisational setting then you need to explain the permissions that you have obtained to do this.

**Research Activity outside of the UK:** please complete this section in detail and note any guidance you have received. Also describe your own familiarity (or not) with the location that you will be utilising.

### **Section F: Scope of Research Activity**

Please tick ALL of the research activities that might be undertaken. If any additional types of activity are intended then please add an extra box and describe these.

If you have answered no to all questions in F then sections G and J do not need to be completed. Section H should be considered, and may be completed. Signatures are still required in section K.

### **Section G: Intended Participants**

Please tick all categories that might apply.

**Numbers & Source:** if you are using a series of different methods or research activities please list numbers for each stage/phase. Be clear about how you will find respondents. Will you use intermediaries, and if so how? How will you ensure compliance with your sampling strategy?

**Information for participants:** all participants should be appropriately informed about the research, what is expected of them and what will happen to the information that they provide. The Ethical review process does not ask to see this documentation, but requires this to be reviewed and approved by the Director of Studies in the case of research students, the supervisor/module tutor in relation to students on taught programmes and the Head of School/Assistant Dean in relation to staff research.

### **Section H: Anticipate Risks**

All research carries some level of risk. The answers you provide to questions in this section will be reviewed to ensure that you have an appropriate understanding of the type of risks involved and how you can mitigate against these risks.

**Risk to participants** Think very carefully about how your actions/questions/discussions might affect the people you are involving as participants. You might identify the risk as small but it would still be a risk. Many types of question have the potential to make respondents less content with their life / job; you need to recognise and try to ameliorate any such effects

If these are business owners, time with you may reduce profit.

In some locations physical risk is very real to both participants and yourself, please consider this.

**Risk to you, the researcher** Think about where you will meet people, if there are any dangers involved in the location. If you are meeting people as individuals think about using a public place. In general do not visit people in their own homes or remote locations. If you are talking to individuals about certain issues think about how their responses might affect you emotionally. What about the risk of collecting insufficient data?

**Risk to the University** When undertaking your research, you are acting as a member of the University (student or staff). Professionalism is important, so it is important to be well organised and well prepared. Punctuality, clarity etc. are all part of this. What will you do to ensure this? You must ensure you do not harm the good name of the University in any way and do nothing to undermine the reputation of the research it conducts and sponsors. Upholding high standards of conduct and integrity are vital in this regard. You must also conduct the research in such a way to minimise the potential for claims of negligence made against the University, its researchers and any collaborating individual or organisation. In this respect you should always comply with ethical, legal and professional frameworks, obligations and standards as required by statutory and regulatory authorities, as well as the university's Research Integrity and Ethics Code of Practice. Research misconduct in this respect can take many forms, including:

- fabrication: making up results or other outputs (eg, artefacts) and presenting them as if they were real
- falsification: manipulating research processes or changing or omitting data without good cause
- plagiarism: using other people's material without giving proper credit
- failure to meet ethical, legal and professional obligations: for example failure to declare competing interests; misrepresentation of involvement or authorship; misrepresentation of interests; breach of confidentiality; lack of informed consent; misuse of personal data; and abuse of research subjects or material
- improper dealing with allegations of misconduct: failing to address possible infringements such as attempts to cover up misconduct and reprisals against whistle-blowers

**Adverse Outcomes.** Think carefully about the possibilities, and cover here

**Section I: Feedback, Consent and Confidentiality**

**Feedback to participants:** outline your approach. Will interview transcripts be shared with respondents to check accuracy? Will summaries of questionnaire analysis be made available to respondents in some way? Will an overview report be provided? How and when?

**Informed consent:** Draft letter / e-mail / or heading (or footer) section of questionnaire must be approved by DoS/supervisor (if research student), supervisor/module tutor if taught student, or Head of School / Assistant Dean if a member of staff.

**Confidentiality/Anonymity.** Explain clearly how you will ensure confidentiality and anonymity.

**Section J: Data Protection and Storage**

Before completing this section it is necessary to read the University's Research Data Management information. The questions that follow are designed to ensure compliance with the Data Protection Act as well as established research protocols.

Many research activities will involve electronic transfer of data and use of data management systems in the summarisation and analysis of data. You will need to explain these in relation to compliance with the Data Protection Act.

Think carefully about who will have access to your data, this will include supervisors and examiners. Also that a thesis will be made available via the University library and the British Library system. If you are seeking an access bar for a period of time after completion then mention it here. If you will provide a copy of your findings, or intend to give a presentation, to a facilitating/ supporting/accessing organisation then explain that in this section. But also think about the general principle of data sharing, as explained in the Research Data Management information.

In terms of storage of data please ensure security, and also mitigate against loss of data.

**Section K: Declaration**

Ensure the appropriate countersignatures have been provided

Look carefully at the checklist and ensure that you comply with and tick all that are relevant to your research.

## Appendix 3: Interview Consent Form



### Carmarthen Business School

#### Interview Consent Form

Dissertation research project title: Income generation in Libraries, Museums and Archives: developing a strategy for StoriPowys

Research course: Master of Business Administration (MBA)

Research investigator: Nichola Farr

Research Participants' name:

Dear Participant,

Thank you for agreeing to be interviewed as part of the above research project. \*Attached to this letter are the interview questions that I have developed, which will assess the appetite for income generation initiatives in Powys County Council's libraries, museums, and archives through the answers you provide to the questions posed. There are no right or wrong answers and your opinion will be valuable to knowledge building around income generation activity in the cultural sector.

The interview should take approximately 30 minutes but there is no time constraint. Interviews will be conducted in a private meeting space and answers will remain confidential. Information recorded will contain nothing of a personal nature that would identify you, and you will not be expected to provide any personal information such as income bracket, home address, date of birth, etc. You are free to withdraw from the interview process at any time.

Academic research undertaken at UK universities require adherence to ethical procedures, which includes seeking explicit agreement from participants to being interviewed and how the information contained in their interview will be used. The following information outlines the conditions of your participation and the purpose of your involvement. I would be grateful if you would read through this, then sign the consent form to certify that you approve the following:

- the interview will be recorded, and a transcript will be produced
- All answers will be anonymised, and no identifiable information will be requested from the interviewee
- the transcript of the interview will be analysed by Nichola Farr as research investigator
- access to the interview transcript will be limited to the research investigator and dissertation tutor

- any direct quotations from the interview, or summary content, that are made available through academic publication or other academic outlets will be anonymized and care will be taken to ensure that no identifiable information will be made public
- the interview will be recorded on a personal device, accessible only to the research investigator. The recording will be deleted as soon as the interview has been transcribed
- The transcript of the interview will be stored on the research investigator's personal OneDrive for Business application within Powys County Council's secure Microsoft Office 365 account. The transcript will be deleted on completion of the dissertation
- The storage of information will comply with Powys County Council's data protection regulations, in line with national GDPR guidance

By signing this form, I agree that:

1. I am voluntarily taking part in this project. I understand that I don't have to take part, and I can stop the interview at any time
2. The transcribed interview or extracts from it may be used as described above
3. I have read the Information sheet
4. I do not expect to receive any benefit or payment for my participation
5. I am comfortable with the arrangements outlined, and I understand that I am able to contact the researcher with any questions I may have in the future

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Participant Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Researcher Signature

\_\_\_\_\_  
Date

If you would like me to share details of my findings on completion of the research, please let me know.

I thank you for your time and participation. If any questions do arise, feel free to contact me at your convenience.

XXXXXXXX XXXX  
Tel: XXXXX XXXXXX

Nichola Farr 1906931

Email: XXXXXXXXXXXXXXXXXXXXXXXXXXXX



## Appendix 4: Data Analysis Table

The table below presents evidence of codes that were generated through a thematic analysis of the semi-structured interview data. The first column details each of the primary questions posed to interview participants.

The list of answer categories that feature in the second column, against each question, are groupings that were determined by the researcher through an in-depth analysis of the interview transcripts. The categories listed were generated through the discovery of repeat patterns that appeared in the interview narrative, where ideas and topics presented were expressed by more than one participant. Generation of these codes also depended on the researcher's interpretation of this qualitative data, through an inductive analysis process, and due consideration of the research aims and objectives.

The third and fourth columns provide some quantifiable data, to justify the decision to include each category. 'Respondent Code' refers to the assumed names allocated to each of the ten participants, to ensure anonymity. 'A' refers to Participant A, 'B' to Participant B, etc. Respondents that provided data for each of the categories is listed, and the final column provides a tally of the total number of responses for each category.

The frequency of patterns and the codes generated were the basis of the themes that ultimately emerged from the data.

Question	Answer Categories	Respondent Code	Number
Q1. How receptive would you be to having a special event organised and hosted by StoriPowys?	Pro	A/B/C/D/E/F/G/H/I/J	10
	Impact on core services	A/B/C/D/F/G/H/I/J	9
	Attitudes/perceptions	A/E/F/I/J	5
	Staff resources	A/B/C/D/F/G/H/J	8
	Being competitive	C/I	2
	keeping it local	C/G/I	3
	museum vs library	A/B	2
	Benefits and outcomes	A/E/F/G/I	5
Q2. Do you think our facilities should provide cafes?	Depends on location	A/B/C/D/E/F/G/H/I/J	10
	Public perceptions	A/D/E/F/G/H/J	7
	Impact on services	A	1
	Accessibility	A/E/F/G/H	5
	Community/social focus	B/C/H/I/J	5
	Local connections	C/D/E	3
	Competition	J	1

	2 different audiences Sustainability	A/B/D/E/F/G/H/I/J E/J	9 2
Q3. Would you support a shop in StoriPowys facilities?	Expected in museums Tailor to the locality Promote the unique area/collections Meet a social need Don't compete with local business Tailor to the audience Affordability Reinvest in the community Invest in user experience Impact on service delivery How is the income used?	A/B/C/D/E/F/G/H/I/J A/B/C/D/F/G A/B/C/D/F/G/H/I/J A/B/E B/C/E/F/G/H A/B/C/G/H/I/J A/B A/C/E/I/J A/B/F/J B/E/H/I/J A/D/F/I	10 6 9 3 6 7 2 4 4  5 4
Q4. How do you feel about corporate support of StoriPowys developments and activities?	No It's necessary to sustain services Suspicious of corporate agendas Conflict with library ethos Ethical considerations Tailor the business support to the service Make agreements transparent Companies that offer more than financial support	C A/B/D/E/F/G/H/I/J A/C/D/F/I/J A/B/C/F/G/H/I/J A/B/C/D/E/F/G/H/I/J B/D/F/I/J A/C/F/G/H/J A/D/F/I/J	1 9 6 8 10 5 6 5
Q5. Do you think that online opportunities for donating money would encourage you to donate?	Lack of online engagement Detracting from core service Fear of internet security Accountability for funds Impact of donation Use campaigns to drive service use	D/E/G/H A/B E/H B/C/D/G/H C/D/E/F/H/I/J C/E/F/I/J	4 2 2 5 7 5
Q6. Would you pay to attend any online StoriPowys events or activities?	Lack of confidence online Communicate reasons for charging Quality of content Unique selling point	D/G/H A/B/F/G/H/I/J A/B/C/E/F/I/J A/B/C/E/F/G/I/J	3 7 7 8

	Equality of access	A/B/E/F/G/I/J	7
	Accountability for funds	A/B/G/H/I/J	6
	Know the audience	B/C/E/F/G/I/J	7
Q7. Would you consider making a financial donation to a crowdfunding campaign for StoriPowys?	Lack of confidence online	D/E/G/H	4
	Keep campaigns simple	B/C	2
	Know the audience	C/F/G/I	4
	Pay for the cause, not a reward	A/B/C/D/G/H	6
	Reward items are wasteful	D	1
	Make it something tangible	E/I/J	3
	Promote service value	E/F/G	3
	Make incentives within reach	I	1
	Develop relationships with users	E/F/I/J	4
Q8. Do you think you would pay to be a member of StoriPowys?	No	A	1
	Fear of funding public services	A/D	2
	Charges to facilitate additional services	A/D/F/G/H	5
	Different audiences to target	B/F/H/I/J	5
	Attract community-minded people	B	1
	Consider cost of living	D/E	2
	Communicate the offer	B/C/D/E/F	5
	Promote the benefits	B/G/H/I	4
	Consider the competition	C/F/I	3
	Community impact	B/E/G/J	4
Q9. Would you be interested in joining a StoriPowys Friends group to undertake activities?	Cocreation of activities	A/E	2
	Raising the profile	C/D/F	3
	Communicate the benefits	A/D/E/F/G/I/J	7
	Keeping it local	A/C/D/H/I/J	6
	Generate service use	A/E/F	3
	Communicate the cause	A/B/D/E/F/G/I/J	8
	Build relationships	B/E/F/J	4
Q10. Would you be interested in supporting a development trust if one were set up	Funding public services	A/D	2
	Working in collaboration	A/J	2
	Accountability	A/B/D/E/G/H/I/J	8
	Communicate benefits and impact	A/B/C/E/F/G/H/I/J	9
	Protecting funds	A/B/C/D/E/F/G/H/I/J	10

alongside StoriPowys?	Local ownership	A/J	2
	Telling the story of the org	C/I	2
	Staff resources	B	