

Jamie Simek. *Beyond the Bake Sale: Fundraising for Local History Organizations*. Washington, D.C.: Rowman & Littlefield Publishers/AASLH, 2022. Hardback/Paperback/eBook, 254p. \$105.00/\$45.00/\$42.50. (ISBN: 978-1-5381-4877-8).

In October 1900, Reverend John Gunn reflected on an opera staged for the benefit of his Atlanta parish: “The training was long and tedious; the expenses enormous. I got typhoid worrying over the thing. Expense of production: \$589. Tickets, etc.: \$500. Loss: \$89.” While Father Gunn eventually recovered from typhus fever and continued staging productions for the cultural benefit of his parishioners, he learned to rely on wealthy patrons for financial support rather than costly fundraisers.¹

With the help of Jamie Simek’s *Beyond the Bake Sale: Fundraising for Local History Organizations*, twenty-first century fundraisers can avoid typhoid and financial loss. Drawing on two decades of experience as a development consultant as well as a fundraising instructor, Simek begins by underscoring the crucial importance of local history organizations whose missions are to document local communities—people, businesses, institutions, etc. But she acknowledges the universal fact that these very same organizations are quite often minimally staffed with underpaid or purely volunteer staff tasked with multiple duties, including—almost as an afterthought—raising the funds to keep the organization afloat. Interestingly, Simek posits that the very same interests that bring people to the field of historic preservation and local history make them natural fundraisers due to their interest in people’s stories and enthusiasm for historic preservation. This assertion runs counter to my own experiences with historical societies, which so often consider as a major coup the ability to hire development consultants so they do not have to deal with the nuisance of fundraising.

Basing her book on the structure of fundraising courses she has taught, Simek breaks it into three sections: “Organizing Your Organization”; “Mastering the Fundraising Cycle”; and “Refining Your Approach.” The first section is information-dense and will probably prove most challenging for institutions that rely primarily on volunteers or limited paid staff. Its six chapters cover fundraising basics, along with the very hard work of creating the documents and budgets that elevate an organization from the amateur historical society housed in the town’s oldest, ramshackle building to a semi-professional organization. Granted, an organization may remain in the ramshackle old building, but at least it will have the policies in place to attract the funds to address deferred maintenance and collections care. Regardless of how historically significant a collection or building is, in order to attract and maintain adequate funding levels historical societies must demonstrate good

1. Sacred Heart Church Records. Archives, Society of Mary, US Province. Atlanta, Georgia.

stewardship—for both collections and funds. Completing this very unglamorous foundational work is an unavoidable task made easier by Simek's shared expertise.

In this section and throughout the book, Simek includes sample documents, checklists, and questions for reflection. Her ability to explain the multitude of documents and forms in simple language makes this portion of the book invaluable. Budgets, line items, profit and loss statements, general ledgers—things that many historians try to avoid—are all explained clearly and concisely. Some additional important considerations that Simek highlights are the Donor Bill of Rights and the requirement that members of the board of directors support the organization financially. The former, while self-explanatory, emphasizes the importance of ethical treatment of individuals, goods, and money. It is not enough for workers (whether paid or volunteer) to love history and historical objects; they must also adhere to professional standards. Similarly, board members must signal their own personal commitment to a historical organization if they are expecting others to contribute. The commitment rather than the level of support is the key issue.

The second section ("Mastering the Fundraising Cycle") gets to the meat of the topic. The first four chapters are dedicated to the four primary steps of the fundraising cycle, or ICAS. One of many acronyms covered throughout the book, ICAS is the most important. It stands for Identify, Cultivate, Ask, and Stewardship. These steps of the fundraising process, as described by Simek, again seem easy and straightforward. She even manages to make the "ask," undoubtedly the most cringey aspect of fundraising, sound painless by emphasizing again that the skills and interests that bring one to historical preservation help to build the kinds of relationships with potential donors that will bring results. One memorable and concrete example she gives for cultivating relationships is an executive director who every Friday delivers a dozen donuts to a donor, just to show he is thinking about them. This simple and relatively inexpensive act keeps the organization the director represents front of mind for the donor. Another key takeaway is the value of silence during the actual ask. Most people hurry to fill a silence with conversation, but she recommends remaining quiet until the prospect speaks. Here, too, she returns to the value of the board of directors for creating and enhancing

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relationships from their own personal circles. It would be difficult for a director to convince an acquaintance to donate money if she herself had not already done so. As an example of how to maintain open lines of communication with donors, Simek reminds the reader to make their grandmother happy and send personalized acknowledgements as soon as possible, preferably within forty-eight hours.

A few unanswered questions center on identification of donors. Obviously, prominent members of the community, members of the organization, past donors, etc., would all be good prospects, but how does one research the financial situation of prospects? While Simek does give a few obvious suggestions, such as donation history, value of real estate owned, etc., are there other ways of identifying potential donors?

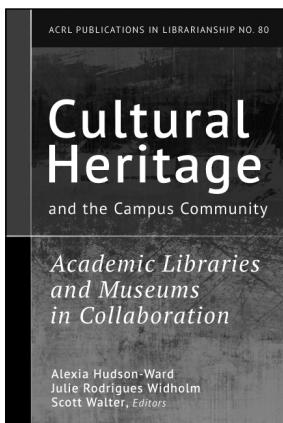
The final and longest section of the book, “Refining Your Approach,” expands on tactics to be used after the basics are mastered. In this section the author finally addresses such special events as fundraisers—the eponymous “bake sale” of the title. As in the rest of the book, her carefully designed charts, questionnaires, and lists raise important considerations that an organization should take into account before planning an event, such as insurance, liability, alcohol service, parking, etc. This section also covers the contributions of volunteers and the differences between donors and members, and even touches on digitization and metadata. It is important to note that in this book on fundraising for historical organizations, there is an assumption of the possession of archives and artifacts, but other than general statements about collections care (e.g., environmental controls, appropriate housing, etc.)—built on the belief that the readers of the book have mastered these basics—she does not offer guidelines on cataloging, interpretation, or exhibitions.

The one topic that is given comparatively short shrift is grants and grant-writing. Perhaps this is because the book is geared toward smaller historical organizations and assumes these organizations will not seek NEH or NHPRC grants, but support from state, federal, or local foundations can be a game-changer for an organization. Simek does offer the important advice of not trying to find a project to suit a grant, but rather find the grant to support a project. While grant applications are not covered as fully as other topics in the book, the “logic model” Simek provides in chapter 16 (“Grant Funding”) is a valuable resource. As with other topics, she emphasizes the value of quantifiable results.

While there is no shortage of books on fundraising for non-profits, this book fills a lacuna with its focus on fundraising for historical organizations. Simek recognizes the unique challenges community organizations face, and she makes an important addition to the existing literature.

Simek manages to convey a staggering amount of information while simultaneously making the task of fundraising seem easy. That is undoubtedly the true gift of this book—the certainty it gives the reader that raising money, even walking into someone's home or office and asking them for cash, is not a daunting, anxiety-inducing task. If a historical organization offers something of value, then prospective donors should, of course, be willing to support it. Because this book is geared toward historical organizations, it focuses on cultivating relationships with local individuals and does not cover as completely grant funding and corporate relationships. What the author does cover, she covers exceedingly well. The book is chock-full of information that readers can return to again and again. If the book does not actually cover the needed information, the extensive notes and bibliography will undoubtedly lead to the answer. The index makes it easy to dip in to find relevant information or refresh one's memory on specifics of a topic. *Beyond the Bake Sale* should be a part of every historical society's professional collection. — Susan Ellis, Marist Society, Inc.

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