

# HISTORY ORGANIZATIONS AND FRIENDS GROUPS

## A Practical Guide for Success

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## Executive Summary

History organizations can benefit immensely from partnering with external support entities, commonly referred to as “friends groups.” A friends group is an organized entity that exists to provide assistance to an organization through fundraising, volunteer, and/or advocacy support, relationship building, and other activities. Maintaining a successful partnership, however, requires clear and consistent communication and effort, without which the relationship can become ineffective.

In response to frequent questions from across the field about how to make the partnerships between history organizations and friends groups more successful, AASLH’s Standards and Ethics Committee conducted a brief survey in the summer of 2021 to understand how both history organizations and friends groups perceived the benefits and challenges of working together. Taking direction from that survey, the committee—with support from the AASLH Public History Research Lab and the State Historical Administrators Meeting—put together this guide to support better partnerships, whether newly established or long-standing.

Respondents to the survey identified several primary benefits and challenges. The survey revealed the most important benefits to organizations were friends groups’ abilities to provide financial and fundraising support, followed closely by their support of community engagement and relationship building. Survey respondents cited financial arrangements, the maintenance of working relationships, and getting fraught partnerships back on track as major challenges; yet, in their qualitative responses, they revealed that those challenges often resulted from poor communication and a lack of strategic alignment.

This report identifies several characteristics necessary for productive and mutually-beneficial working relationships between history organizations and their friends groups. In particular, the report recommends that history organizations and their friends groups have:

- **Foundational documents** that, through the naming of the friends group and its mission statement, clearly identify the role of the friends group in supporting a particular history organization.
- **A formal operating agreement** between the history organization and the friends group that make clear that the friends group’s contributions of funds and time will meet the needs of the history organization and that strategic guidance and final decision making belongs to the history organization.
- **Clear, ongoing communication** between the staff and/or board of each entity regarding the common mission, strategic planning and initiatives, and development of goals.

Despite both groups' best intentions, however, relationships between history organizations and friends groups can sometimes get off-track. When relationships become strained or the efforts of the two entities become misaligned, getting things back on-track requires real focus on communication and intentional effort to improve the relationship. This often includes:

- Setting ground rules for the discussion to ensure both sides can actively listen to the concerns of the other party and understand the issues at hand without assigning blame.
- Acknowledging and appreciating the talents and contributions of all participants to present a positive attitude and keep the focus on the groups' mutual goals.
- Work together to determine the underlying cause of the conflict (e.g., poor communication, misalignment of purpose, lack of clear authority) and resolve any deficiencies in procedures or governing documents to correct the issue.

Finally, for institutions considering establishing a new friends group, perhaps for the first time, there are important things to consider to determine if you are ready or not. Some questions to think about to assess your readiness include:

- What needs might a friends group be able to meet for your history organization?
- Do you have a core group of supporters to help you start a friends group? Do they have a passion and clear understanding for your organization's mission and vision?
- Does your history organization have the time and staff resources to meaningfully support and engage with a friends group?
- Does that group of supporters have the time to commit and the expertise required to start a friends group?

In summary, friends groups can provide invaluable support to history organizations, often carrying out activities and providing support crucial to history organizations' operations. Maintaining a productive relationship, however, requires ongoing effort from both parties to make sure things stay on track. Clear communication and shared expectations can help set up a partnership for success.

*This report was researched and written by a working group composed of members from the AASLH Standards and Ethics Committee, State Historical Administrators Meeting, and Public History Research Lab. The working group's primary authors were Angela Agard, Margaret Koch, Andrea Lowery, John Marks, Aimee Newell, and Erin Richardson. They would like to thank the other members of the Standards and Ethics Committee, State Historical Administrators Meeting, Angela Reed of the Texas Historical Commission, and all the survey respondents and colleagues who helped shape this report.*

## Introduction

Chances are, if you have worked or volunteered at a history organization, you have heard the term “friends group.” This phrase may have been accompanied by tales of a wildly successful capital campaign or expressions of broad community support, or it may have been followed by stories of a relationship gone wrong.

AASLH often receives questions about how history organizations and their supporters can build successful partnerships. To help better address these questions, a working group composed of members of AASLH’s Standards and Ethics Committee and the State Historical Administrators Meeting—with the support of the AASLH Public History Research Lab—took a deep dive into friends groups, surveying people in the field with relevant experiences to understand the benefits and pitfalls of friends group partnerships and examining what practices foster effective collaboration. We also wanted to look at factors that can contribute to fraught relationships between organizations trying to support the same cause and what can be done to turn those relationships in a more positive direction.

To prepare this guide, the working group surveyed representatives of both history organizations and friends groups in the summer of 2021. 86 people responded, representing both history organizations (68) and friends groups (12); about 45 percent of respondents represented organizations with annual budgets of less than \$250,000 and nearly 70 percent reported budgets of less than \$1 million. This sample is small, but the responses help us begin to understand the range and complexities of the relationships between organizations that co-create, share, preserve, and otherwise “do” history work.

Our respondents agreed there were numerous potential benefits that friends groups can bring to a history organization. There was also agreement between both groups that the most significant challenges are maintaining a productive relationship between the supported and supporting groups and knowing how to move forward when something goes awry.

This paper can help history practitioners determine whether their history organization and its supporters would benefit from creating a friends group and lay out elements that are key to developing a successful partnership, or to help get an existing relationship back on track. For

friends groups, this paper can serve as a guide to more effective working relationships with the staff at the history organization the group supports.

### What is a Friends Group?

A friends group is an organized group of volunteers that exists to provide assistance to another organization through fundraising, volunteer, and/or advocacy support. Often, a friends group may have its own 501(c)3 status, but some operate under the status and by-laws of the organization they are supporting. Some friends groups may use different names—association, foundation, etc.—but for the purposes of this paper, we will refer to them all as “friends groups.”<sup>1</sup>

### What are the Benefits of Having a Friends Group?

According to our survey, one of the primary benefits of a friends group is its fundraising ability and the financial support role it can play for history organizations. When asked to assess the value of their work with friends groups, 53 percent of survey respondents said a friends group’s financial or fundraising support was a “major benefit.” Comparatively, about 47 percent described friends groups’ support of relationship or community building as a major benefit, and just 24 percent rated administrative or programmatic support that way.

Indeed, a friends group can bring additional financial resources to your organization. They can fundraise for specific campaigns or programs, or bring in additional revenue through memberships and annual or planned giving. They can apply for grants on behalf of your organization. They can bring in funds through programming, events, and facilities use, as well.

Further, if your organization is a public entity, a friends group can offer ways to get things done both within and beyond the restrictions of your organization’s government requirements. For example, if a portion of your budget is inadequately funded or there are costs your organization is prohibited from incurring, a friends group can often raise money for those particular expenses. If your staff are unable to directly ask for funds, a friends group can do that on behalf of the organization. They also serve as an advocate for your organization or lobby for policies that support your work through means that may otherwise be unavailable to you.

While fundraising needs are often a consideration in establishing a friends group, their assistance can go beyond the financial. Friends groups are often made up of your most

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<sup>1</sup> The working group profusely thanks Angela Reed of the Texas Historical Commission Historic Sites for allowing us to use material from “Friends in High Places: Navigating Friends Group Partnerships,” <https://www.thc.texas.gov/blog/friends-high-places-navigating-friends-group-partnerships>.

enthusiastic supporters who embrace your organization's mission. They help strengthen relationships within your community and initiate significant outreach, recruiting others to your cause and elevating your profile. They can also be beneficial in assisting with recruiting volunteers and interns.

### What are the Key Elements of Having a Successful Friends Group Relationship?

Relationships between friends groups and history organizations are ultimately relationships between people. As with all kinds of relationships, when everyone is on the same page, there is potential for great harmony and positive energy, but misunderstandings, lack of clarity, and poor communication may undermine everyone's best intentions.

Clear expectations, defined roles, and boundaries are critical to a successful relationship. To cultivate a positive and effective working relationship, all parties must agree on what the common goals are and understand their roles in achieving those goals. Establishing written boundaries and mutual understanding of the parameters for oversight and independence are vital to a harmonious partnership. As with any relationship, things can go awry in a hurry without common understanding and excellent and transparent communication. For example, if authority regarding collection development is not clearly defined, a friends group may accept artifacts for the collection on behalf of the history organization that the history organization may not need or want. Without clear communication, a history organization and a friends group may have separate conversations with a potential donor leading the benefactor to walk away because the two entities are not aligned in their strategy and messaging.

A common source of misunderstanding relates to oversight and responsibility. While the two groups are aligned in purpose and function as partners, ultimately oversight and the **stewardship of resources lies with the history organization**. Therefore, the history organization will have a significant role in setting priorities and weighing in on decisions made by the friends group. Of course, it is important for a friends group to be empowered, but they, by definition, play a supporting role to the history organization.

### *Foundational Documents: Naming the Support Group and Defining its Mission*

Your friends group's name and mission are critical to ensuring it is—and remains—aligned with your history organization. In the recent AASLH survey, history organizations frequently highlighted misalignment in mission and strategic goals as a significant challenge to maintaining a positive relationship with their friends group. Survey respondents cited financial

arrangements, the maintenance of working relationships, and getting fraught partnerships back on track all as major challenges; yet, in their qualitative responses, they revealed that those challenges often resulted from poor communication and a lack of strategic alignment.

Key to avoiding these challenges and maintaining a positive relationship is a clear set of foundational documents. Your friends group will have in its founding documents both a name and a defined purpose. It is critical that the friends group uses the name and shares the mission of the organization they support. This makes it clear for donors and other stakeholders that they are ultimately supporting the history organization's work. Since friends group board members change over time, this alignment seen in the founding documents clarifies the intended relationship for any incoming board members, in addition to keeping legacy board members on track. If it is a 501(c)3 organization, the friends group also has federal and state legal obligations that are defined by their mission and bylaws. In the event that your friends group dissolves, this common name and mission can be helpful in protecting assets raised in the name of the history organization. Founding documents begin with the establishment of a concise, practical, and achievable mission statement:

**A strong mission statement** might read, "The mission of the Friends of X organization is to support, promote, and provide resources to X organization."

**A weak mission statement** might read, "The mission of the Friends Group is to promote appreciation of and provide support for the understanding of the history of X area."

### *Formal Operating Agreement*

Even when your history organization and your friends groups have the same goal in mind, relationships may be derailed by competing priorities, disagreement over how to spend funds that have been raised, or competing ideas on how to accomplish a goal. Who decides these things and how is that policy formalized?

A written agreement, such as a Memorandum of Understanding (MOU), helps avoid ambiguities by defining the scope of work your friends group will undertake.

The agreement should clarify how and by whom decisions will be made regarding the efforts of your friends group. Ideally, the agreement will involve a spirit of mutual input, but because the history organization has the ultimate legal responsibility for the museum or site, the final decision and oversight rests with the history organization. In some cases, a history organization may include in the agreement a requirement that the friends group have someone from the

supported organization on their board to ensure each group remains aware of the supported organization's needs and circumstances.

Lack of consensus on priorities is a common pitfall between groups. The agreement may outline how the history organization establishes priorities, how the friends group contributes to the establishment of the priorities, and the ways in which those priorities are communicated; for example, through regular meetings, presentations, a prospectus, etc.

Differing opinions regarding finances can cause negative feelings in any relationship. A formal agreement will help avoid financial discord by defining decision-making policies related to funds raised, the expenditure of those funds, and the sharing of revenues and financial responsibilities. The agreement should address the review process and ethics for accepting or declining financial or physical (artifacts, etc.) gifts, controls related to expenditure of funds such as final approval of any staff the friends group may hire to manage its own operations, or parts of the history organization's operations that it supports (e.g., extra paid tour guides), financial arrangements related to the sharing of proceeds between the friends group and the history organization, any financial or in-kind support that will be provided by the history organization to the friends group (office space, graphic design, etc.), and any financial responsibilities the Friends Group will bear. You may also choose to include requiring the friends group to submit an annual plan and budget by a certain date prior to the start of the fiscal year for approval by the history organization. It is also advantageous to put in writing what conditions apply if either group is unable to meet its goals because of an unforeseen event, such as a pandemic, hurricane, or fire.

Your operating agreement may define additional responsibilities of each group. For example, you might spell out responsibility for particular operations or who provides direction and ultimately control over final messaging, marketing, and interpretation.

**A strong operating agreement** will outline the purpose of the friends group and make clear that their contributions will meet critical needs of the history organization as defined by its planning documents. It will clarify that strategic guidance and final decision-making belongs to the history organization; this will be defined for all aspects of the friends group operations, whether they are related to money, time and effort expended, or advocacy.

Inevitably, some friends groups will cease to operate. A good agreement will address dissolution of the supporting organization, including language regarding disposition of assets and the possibility of retaining the basic relationship structure to allow a new friends group to be constituted in the future.

Lastly, a good agreement always has a termination clause and an end date.



**A weak operating agreement** is a verbal agreement/understanding between two people no longer associated with the organizations.

### *Ongoing, Meaningful Communication*

Like all relationships, a relationship between a history organization and a friends group requires an investment of time and cultivation of the relationship through the efforts of both parties. Common understanding is maintained by regular and transparent communication and flows in both directions.

The history organization and the friends group should participate in the development of each other's strategic plans. To ensure continuity of the relationship as staff leadership and membership of each organization's governing authority changes, it is imperative to regularly review governance documents and jointly onboard new board members. To ensure both groups are operating with the same ethical standards and have common understandings, the history organization should support the training of the friends group regarding industry obligations and best practices, and where possible, include the friends groups members in professional conferences and continuing education programs. Input from the history organization staff should help inform and guide friends group board decisions.

Regular and meaningful communication will foster greater alignment between organizations.

**Strong communication** requires transparency and frequency. Conversations should include the common mission, strategic planning and initiatives, and development of goals. The MOU should establish which members from each organization attend the other's board meetings and, if legally possible, who participates in the other's board meetings as ex-officio board members.

**Weak communication** manifests in undocumented conversations or decisions, so that when members of either organization have leadership changes, questions or need clarity, there is no source of agreed upon parameters to reference. This often occurs when representatives of the groups do not meet regularly or formally.

### **Should You Establish a Friends Group? A Readiness Check**

In determining whether your history organization should establish a friends group, you should consider the following questions:

What does your history organization need? Will a friends group be able to provide that support? Some supporting functions may include:

- Fundraising
- Serving as a grant partner
- Spearheading promotion and marketing
- Advocating for your organization with government funding agencies
- Addressing an immediate need such as a new building or a major budget increase through a capital campaign
- Creating a volunteer corps
- Starting a membership program

Do you have a core group of supporters to help you start a friends group? Do they have a passion and clear understanding for your organization's mission and vision?

Does your history organization have the time and staff resources to meaningfully engage with a friends group?

Does that group of supporters have the time to commit and the expertise required to start a friends group? Your friends group will need people who can assist with:

- Filing for incorporation and negotiating legal documents—an experienced legal review is recommended for both parties.
- Managing record-keeping and reporting to ensure financial accountability.
- Developing governance documents.
- Ensuring compliance with laws and regulations include annual tax document filing, if applicable.

If you can answer yes to all of these questions, a friends group may be just the solution you need to achieve your goals.

### Getting Your Relationship Back on Track

In the AASLH survey, respondents asked for educational resources and guides, templates for Memorandums of Understanding and Bylaws for friends groups, and training for the stakeholders of both groups about the organizational model and how to ensure it succeeds. (See the end of this report for resources.)

Both groups, but particularly history organizations, cited the most significant challenges they faced as maintaining a productive relationship and knowing how to move forward when

something goes wrong. History organizations frequently highlighted misalignment in mission and strategic goals of the friends group with their history organization's goals as a significant challenge. For example, the history organization may evolve its mission over time, but the friends group may continue to advocate and fundraise around the old mission, leading to stakeholder confusion and unattainable objectives.

Both the friends groups and history organizations responding to the survey identified their relationship with finances as among the greatest challenges. Many respondents said that lack of clarity regarding the financial arrangements and commitments between the two organizations posed problems. Boundaries between the two groups, including specifying who is responsible for what aspect of the operation, can become blurred over time (or immediately) if not clearly stated at the outset. Expectations on how communication occurs between the two groups was the second-most highlighted difficulty.

Wherever human beings are involved, some level of conflict is ultimately inevitable. Letting problems fester will harden conflict and polarize people. Negative comments, actions, and outcomes should be addressed between the groups as swiftly as possible.

Tactics for unpacking the conflict and trying to resolve it in a positive way may include the following:

- Set ground rules for discussion.
- Be reliable and approachable so people feel at ease addressing issues.
- Lay out issues without assigning blame. Explain why each concern is a problem that affects both the Organization and the Friends Group, and ultimately the public they are trying to serve.
- Actively listen to each person's viewpoint. Ask questions to better understand what is at the heart of a person's passion. Listen to understand, not to respond.
- Bring people back together by talking about the group's common purpose.
- Acknowledge and recognize individuals or sub-groups to create stronger feelings of ownership.
- Show appreciation for the talents and contributions of the participants.
- Present a positive attitude about both groups and focus on the mutual goals that are achievable.
- Try to resolve the problem as it relates to the groups' purpose.
- Determine the underlying cause for conflict (poor communication, misalignment of purpose, lack of clear authority). Resolve any deficiencies in procedures or governing documents and identify next steps to correct those.

Moving beyond specific conflicts, relationships between history organizations and friends groups are dynamic. Board members cycle on and off; staff members change positions or transition out of the organizations. Changing personalities will affect dynamics between the organizations.

To ensure that your group can minimize the bumps that will come with these changes, it is important to:

- Jointly create a comprehensive onboarding process for both the history organization's staff and the friends group board members that can be updated as necessary and used consistently.
- Onboard new staff and board members of both groups by reviewing roles and responsibilities as outlined in the governance documents.
- Spend time getting to know each other, including interests, strengths, and weaknesses.
- Take time to spend with each individual, getting to know them and their strengths better. Do the research on who is at the table.
- Regularly review governance documents.
- Provide training and educational programs for board members.
- Require regular active board participation.

## Conclusion

Friends groups can provide essential support for history organizations. Effective foundational and operating agreements, open communication channels, and clear definitions of the role each entity plays in the relationship are just some of the characteristics that make these partnerships successful in doing history. Whether a friends group has supported a history organization for decades or a history organization is just starting to consider working with such a group, taking time to define the partnership, agree on strategy, and understand each other's perspectives can strengthen relationships for the long term and benefit both groups individually and the partnership as a whole. Setting up structures to review, affirm, and maintain those foundational agreements, communication protocols, and strategy can ensure continued success.