



Ulster Historical Foundation

Reset and Restart

Our Plan for Recovery



You know us already ... but here is a reminder of what we do

Ulster Historical Foundation is a unique organisation. We are the only body on the island of Ireland that combines expertise in family history research with the publication of high quality historical and genealogical books.

Much more than that, the Foundation is the only Irish organisation that delivers annual conferences and courses in family history and conducts extensive lecture tours in North America every year and elsewhere less frequently.

We are passionate about the history of Ulster and the story of the families that have lived in all nine counties of the historic province over the centuries. We love communicating that history to others, both local people and visitors to these shores.

And we do it all without one penny of grant aid from government

Through the year we welcome people from all over the world to our offices for research and family history consultations. Last year we were thrilled to assist American author Lisa Sharon Harper with seventeenth-century research into her family history for her next book!



Our conferences provide participants with opportunities to dig into the archives and discover information they could never find online. During our October 2019 conference everyone found out something new about their ancestors and their lives in Ireland including Colin who found his ancestors in an estate map and rental from the 1720s; Meg who found 1769 maps and surveys created by her 5th great-grandfather and his sons; Brian who found his ancestor in the 1803 agricultural census listing how many cows, sheep and horses he had; Jane who found the names of the father and siblings of her VERY elusive great-great-grandmother and the location of the family farm; Tim who found his family in the church vestry minute books in the 1760s pushing his ancestors back another 30 years and

finally Sally who found a will of her ancestor from 1680 in which he left his horse 'Boniface' to his nephew!



What is more, Colin – who identified his ancestor in an estate map from the 1720s – helped to bring that map back from the 'dead'. This item had been marked lost in the PRONI catalogue since the move to Titanic Quarter in 2011. Thanks to the dogged determination of a genealogist at one of our programmes this splendid map is now available again for all to enjoy.

We also provide opportunities for overseas researchers to showcase their own work here. In January 2020 we helped to organise a lecture by our Guild member Kevin Cassidy on using American records to uncover Irish ancestors. In 2018 Kevin had helped to host a genealogy programme in Omaha, NE.

Why we need your support

Ulster Historical Foundation is entirely self-funded. We depend on the generosity of our members, supporters and customers to continue to provide the range of services that we offer.

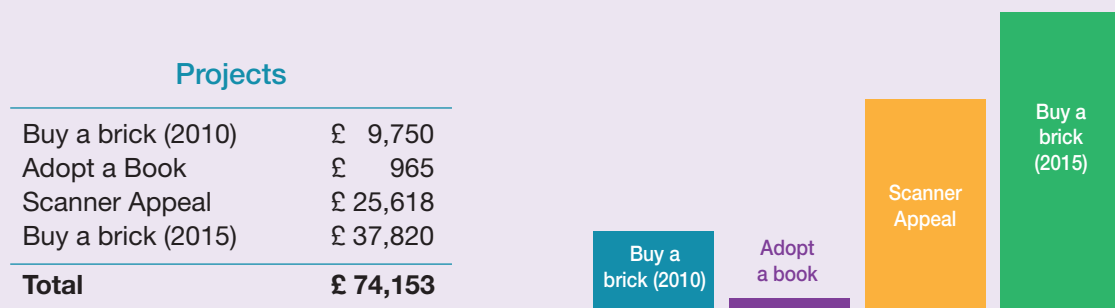
We have wonderful resources built up over nearly 65 years, great ideas and ambitious plans to develop more resources that can benefit the wider research community, but especially our members.

The Foundation's emblem is a ship, chosen to represent the passage of thousands of people who have departed from Ulster over the centuries. Using the metaphor of a ship, we can say that the Foundation has come through some choppy waters over the years and at times it looked like we were perilously close to foundering. But ingenuity, imagination and sheer hard work have kept us afloat. The ship has now been stabilized and we hope that we are sailing in calmer waters.

With your support we believe that we can flourish, not only building on what we have achieved, but reaching out to a new generation of researchers and those fascinated by the history of the place we call home.

Donor Impact

Since 2010 with your help, and the help of a number of successful applications to charitable trusts the Foundation has raised £74,000 in donations to help us realise some important objectives. These include:



We are profoundly grateful to our members, donors and supporters for the faith you place in this organisation.

The Foundation in numbers

3 continents and **8** countries in which we have delivered genealogy programmes since 1979

31 volumes of gravestone inscriptions published for Antrim, Down and Belfast

42 years our membership association – the Guild – has been in existence

46 US states in which we have spoken (plus **8** Canadian provinces, **6** Australian states, and New Zealand)

64 years we have been in existence

250 books we have published

1,600 current members of our Guild of whom **226** are life members

2,000+ participants during each of our annual North American lecture tours

2,400 overseas delegates at our conferences and courses in the past 30 years

3,000+ bed nights added to the local tourism economy in Belfast since 2015

14,000 number of in-depth research commissions undertaken

2,000,000 records we have online

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Coronavirus has changed the world in six months. The future is unknown but will be different from before.

Travel is disrupted, archives such as the Public Record Office of Northern Ireland remain closed, and though they are making tentative plans to reopen, it will not be for groups, at least in the immediate future.

Responding to the new environment is essential. The objectives laid out in this original plan – prepared before the pandemic struck – are not redundant, they remain important to the Foundation and our future.

That said priorities have changed. During lockdown we had the time to consider our options and decide how to respond. We want to push the reset button and restart our recovery with a modified version of the plan.

Three-strand approach

We still would like a permanent home for the Foundation to put down roots and grow the charity. But in the period immediately ahead redeveloping the website is the priority. It calls for a three-strand approach:

- A complete redevelopment of the Foundation's website to begin almost immediately. Our funding goal is £30,000; the amount already pledged/secured is £21,000.
- Make ready our Genealogy Hub and Research Suite for when we can reopen to the public (Note: supporting the development of the Genealogy Hub can be best done through our 'Buy a Leaf' programme (see pages 6–7 of this brochure for details)).
- Digitise and provide remote access to treasures from our hugely valuable research library.

You can read more about **Reset and Restart: the Foundation's Plan for Recovery** at:

www.ancestryireland.com/invest-in-our-future/reset-restart/

Building for the future – Our Five-Year Building Fund

In March 2020 the Foundation relocated to premises at Kiltonga near Newtownards, County Down. Situated only 20 minutes from the Public Record Office of Northern Ireland, the new location has considerable potential: it will allow the Foundation to grow and develop, especially with regard to our library and research collections. There is ample free parking on site for staff and visitors and we are located close to the main bus route to and from Belfast.

The move, however, does flag up a major recurring issue: remaining within the rental sector means that we must grapple with this issue every five years, when the rent review is due. We wish to end such a peripatetic existence and all the uncertainty, disruption and upheaval such periodic moves bring to the organisation.

Therefore in March we launched a Five-Year Building Plan to find a permanent home for the Foundation. Although the Covid19 crisis has called on us to refocus our priorities in the short term and a complete redevelopment of the website is our number one priority presently, a permanent home still remains the prize.

While we do not know yet if Bradley Thallon House will become the Foundation’s permanent home, our Board of Trustees wish to put our future on a more secure footing home and have taken the decision to seek to purchase a property as a long-term goal. Will you help us achieve that?

Bradley Thallon House UPDATE

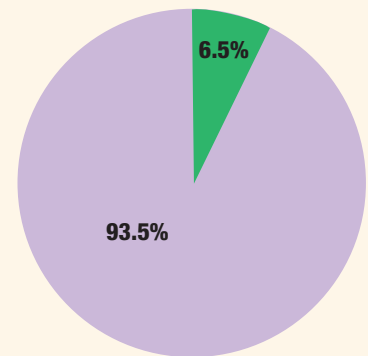
The Foundation moved into Bradley Thallon House, Kiltonga at the start of March 2020. The building is a superb facility: laid out over two floors it comprises just over 3,000 square feet and is well configured. The ground floor has a series of good-sized private offices, plus a reception area and small foyer. The first floor is a large space in which we are creating our Genealogy Hub – the whole floor will be dedicated to it (follow our progress on: www.ancestryireland.com/genealogy-hub/). At roughly 1,330 square feet this open-plan format, with excellent natural lighting, will be a pleasant, peaceful research environment in which genealogists can spend the day researching without interruption and with immediate access to our staff’s knowledge and experience.



Our Building Fund Goal Plan

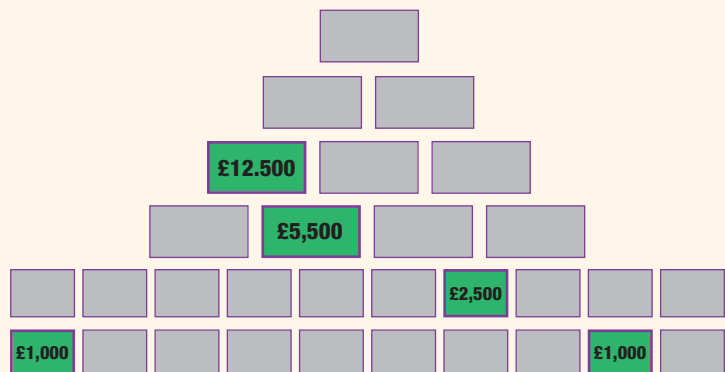
Our Building Fund target is £350,000. We are ambitious but realistic. We want to secure a suitable home that will allow us to serve members and family historians at home and abroad. We hope to achieve it through our Goal Plan – pledges of varying levels that we will work hard to build over a five-year period.

We are delighted to say, we have started on that journey already. To date we have secured pledges of £22,500 or 6.5% of the overall target.



Our goal plan is as follows:

Amount	Achieved by:
£50,000	1 gift of £50,000
£50,000	2 gifts of £25,000
£37,500	3 gifts of £12,500
£30,000	3 gifts of £10,000
£22,500	3 gifts of £7,500
£50,000	10 gifts of £5,000
£25,000	10 gifts of £2,500
£15,000	10 gifts of £1,500
£20,000	20 gifts of £1,000
£25,000	50 gifts of £500
£18,750	75 gifts of £250
£10,000	100 gifts of £100



Can you see yourself somewhere in our Goal Plan?

While large pledges will accelerate us successfully to our Goal, small pledges matter too. Irrespective of a donor's circumstances, every penny counts. And as yields on deposit accounts continue to improve, pledges banked early will accumulate interest over the life of the Plan.

If you would like to support our Plan but have already made commitments to other good causes, you can make a pledge over several years if you wish to spread the commitment, eg:

£1,500 for 3 years = £4,500
£500 over 5 years = £2,500

Remember too, the benefits of tax efficient giving via the Irish American Partnership's Designated Giving program. In addition, IAP can also accept donations of shares and other financial instruments, as well as cash gifts, on behalf of a designated partner such as the Foundation (see back page).

Importantly, Gift-Aided donations from UK tax payers will give us an additional 25% on the donation, at no cost to the donor. Thus you can maximise the benefit of your donation to us, and could potentially reduce your tax liability (see back page).

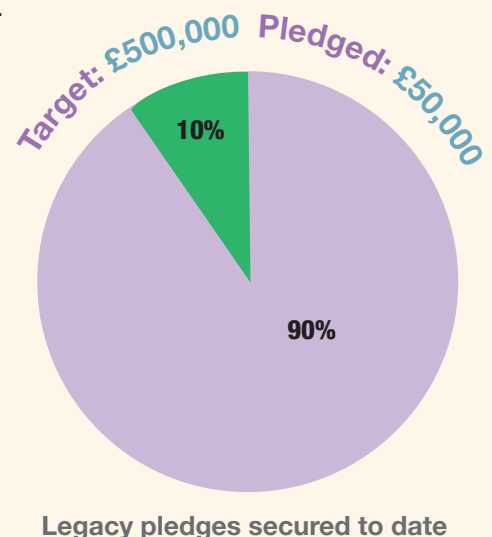


2 Leave a legacy that will make a real difference

Legacies are becoming increasingly important for charities as they try to secure their future. After making provision for loved ones, you may feel able to leave something to a cause that is close to your heart.

Costing nothing in your lifetime, leaving a gift in your will to the Foundation has the potential to sustain our work and benefit others for many years to come. Can we ask you to think about making a legacy pledge to the Foundation.

If you are not in a position to consider making a financial gift, perhaps you might donate books and other publications that will augment our library and be to the benefit of other researchers in the years ahead.



3

Irish Migration Memorial

– commemorate an ancestor and help us create our Genealogy Hub

The Foundation would like to develop an Irish Migration Memorial where interested parties could commemorate a specific ancestor, or family line that they have been researching, and in doing so help us to create our Genealogy Hub.

The Migration Memorial would be in the form of a tree with members of the public able to sponsor a leaf in memory of their ancestors. A tree and leaves we believe are particularly appropriate motifs in relation to migration and family history. There are two main options: the leaves will be available in two sizes, the difference reflecting the level of sponsorship.

Smaller Leaf

The cost of sponsoring a smaller leaf starts at **£125**. For this level of sponsorship the donor could provide the surname and location of where the family came from in Ireland and where they settled overseas, plus the donor's name (if you so choose), for example:



Example only, not actual tree

WILSON

Ballymoney, County Antrim
Staunton, Virginia
MRS K. SMITH, PITTSBURGH PA

MULLAN

John Mullan (1845-87)
Born Portaferry, County Down
Son of Bernard & Elizabeth
Married Mary Savage 1871
Father of Bernard, Francis, Elizabeth, Mary & Susan
Died Chicago, USA
MS A.SMITH, TORONTO ON

Larger leaf

The cost to sponsor a larger leaf will start at **£250**. This will enable the sponsor to submit more detailed information on an ancestor, for example:

Named donor

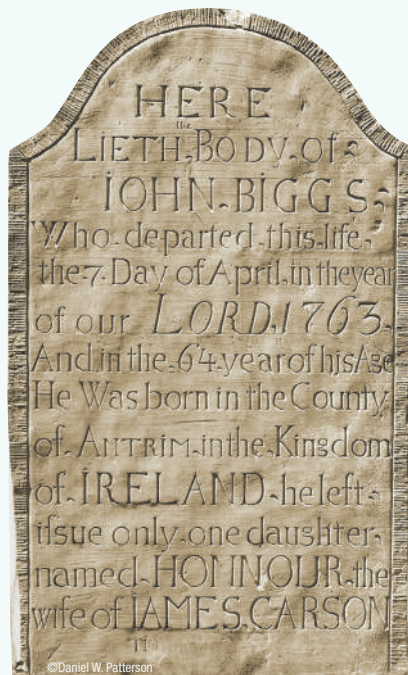
A third option, for those who wish to contribute, but who may be unable to name a direct emigrant ancestor, or may not feel in a position to sponsor £125 or more, is to be named on a plaque which will accompany the donor tree. Donations of over £25 will entitle the sponsor to be named on the Migration Memorial panel.

Migrant ancestor database

In addition, for all three levels of sponsorship it will be possible to submit information on the donor's migrant ancestor/s for inclusion in a searchable database which will be free for anyone to browse.

We believe the Migration Memorial can be another way of connecting with the Diaspora and commemorating the links between the island of Ireland and the rest of the world – a celebration of those links, perhaps with the potential for the Memorial and the database to become a useful resource to family historians in its own right.

We have already received £550 in sponsorship towards the Migration Memorial. We hope you will sign up.



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Creating a Genealogy Hub

The first floor in the premises at Kiltonga is ideally suited to becoming our Genealogy Hub and family history research centre. By commemorating your ancestors on the Migration Memorial your sponsorship can help the Foundation to fit out the Genealogy Hub. Our project target is £20,000.

The Foundation has a small but hugely valuable research library. Recent major donations by supporters have significantly added to our holdings and made it a major resource for those searching Ulster ancestors. In particular, the generous donation of more than 1,100 books by our long-time Trustee and former Chairman, Professor Richard Clarke, adds a priceless collection of volumes to our library; nearly all of which would be of interest to researchers.



Given the extent of donations we need to invest in producing an up to date and accurate catalogue which is accessible from our website, install additional shelving to accommodate the recent and future donations, re-shelve the current stock, repair broken bindings, provide suitable protective storage for rare and valuable holdings, and fit out the research suite for public and member use.

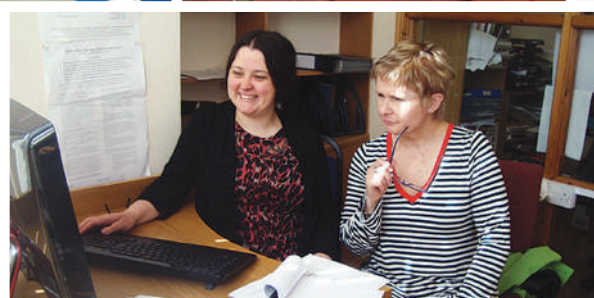
In looking to the future, we believe that further investment in our digital infrastructure is essential. We aim to build a new website which will provide our members with even greater access to the Foundation's resources. Our online databases will be redeveloped to allow a higher degree of interrogation. The Members' Area will be expanded with new content.

And given the research value of some rare items in our research library

(all now out of copyright) digitising aspects of the collection for a global audience as part of the Genealogy Hub will give much broader access to these rich historical resources.

By commemorating your ancestor on our Migration Memorial, you help to mark their existence and contribution in life as part of the Diaspora, and researchers have another medium to share their research work with a globally-connected genealogy audience.

In turn, your support enables us to furnish the Genealogy Hub with materials and develop more resources that will benefit family historians. In so doing, you are helping us to help you.



How to make Donations to Ulster Historical Foundation

Ulster Historical Foundation is an educational non-profit organisation and a registered charity. The Foundation's accounts are Charity SORP compliant and are audited annually.



Ulster Historical Foundation

Registered with the Charity Commission
for Northern Ireland NIC 100280

By bank transfer

Bank: AIB (NI)

Bank Address: 11/15 Donegall Square North, Belfast, BT1 5GB

(UK donors)

Account number: 10921251

Sort Code: 93 86 55

(International donors)

IBAN: GB86 FTBK 9386 5510 9212 51

BIC: FTBKGB2B

Registered with



FUNDRAISING
REGULATOR

Through the Irish American Partnership

Support the Foundation with a tax-deductible contribution through the Irish American Partnership www.irishap.org/ulster-historical-foundation or call on +1 617-723-2707

Note: For US citizens contributions can be made via the Irish American Partnership. The Irish American Partnership is a US 501(c)(3) Non-profit Organization (Tax ID # 22-2801642) which allows a US donor to take a tax deduction for the gift. The donor can designate UHF as the recipient of 100% of the gift to IAP.

An individual can also donate appreciated stock to UHF. For example, if an individual owns 1,000 shares with a value of \$25 per Share which cost them \$5 per Share, the individual can gift the stock to IAP with UHF designated as the recipient of the gift. In this case, the person would get a \$25,000 tax deduction on their US Federal tax return and in a 25% US tax bracket save \$6,250 of taxes.

Via the Foundation's website

www.ancestryireland.com/make-a-donation/

Via Paypal.com

Use the 'send money' function to: kathryn.mckelvey@uhf.org.uk

By cheque

Payable to: 'Ulster Historical Foundation' and posted to the address below, or use the enclosed form.

Gift Aid

UK tax payers: for every pound you donate to the Foundation HMRC will give us an extra 25 pence. This is at absolutely no cost to you. Moreover, individuals who pay tax at the higher rate in the UK may actually reduce your tax liability by Gift Aiding to charity.

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For example, if an individual in the 24% UK tax bracket makes a £1,000 GBP contribution, the individual would save £200 in tax while UHF would receive £1,250 GBP. Similarly, a donation to a charitable cause may help to reduce an inheritance tax liability.

See the Foundation's website (www.ancestryireland.com/efficient-giving/) for more information. To Gift Aid your donation you can use this link: www.ancestryireland.com/gift-aid

By donating books

You can also help develop our library resources by donating useful or valuable research books. Or we could raise additional funds by selling donated books (with your permission), especially where we already have multiple copies of a specific title in the library collection.

Ulster Historical Foundation

Bradley Thallon House, 44D Belfast Road, Kiltonga Estate,
Ballycullen, Newtownards, Co. Down, BT23 4TJ

Tel: +44 (0)28 9181 2073 E-mail: enquiry@uhf.org.uk Web: www.ancestryireland.com