

The Charity First Series

# *RAISING FUNDS FOR YOUR SCHOOL*

*A comprehensive guide*

Nick Ryan



The Charity First series aims to provide practical and straightforward guidance on the challenges confronting charity operations today, with fundraising in the spotlight. Its individual subjects range from those concentrating on the UK and Ireland to non-profit issues in the EU and other jurisdictions, from traditional to digital fundraising and from basic help for those just entering the third sector to specialist areas for the more experienced.

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**RAISING FUNDS FOR YOUR SCHOOL**  
*A comprehensive guide*

**Nick Ryan**

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*Dedication Page*

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## FOREWORD

As a funder of schools and educational projects in London since the mid eighteenth century, Sir John Cass's Foundation is keenly aware of the constant financial demands faced by all who have a responsibility for educational provision. Though many facets of the educational sector will evolve and change over time, some features remain constant, and among these the need to maintain the highest educational standards and to offer the broadest range of opportunities for the enrichment of all our young people are always of paramount importance. At the best of times these requirements place heavy demands on school heads and managers, but in times of financial constraint – such as when public funding is frozen or in decline - the challenge of how to provide sound, broad-based education in the sort of well-equipped school environments that are most conducive to personal development and learning becomes particularly acute. This is a stark challenge facing many schools at present, at all age levels from primary through to further education.

To meet this funding challenge, all schools are likely in future to need to learn how to attract voluntary income, to complement funds received from public and other sources. The higher education sector has demonstrated in recent years that this is an eminently achievable ambition, though the majority of schools currently lag some way behind, as they lack both the information on how to develop a fundraising strategy, and the culture that can help fundraising programmes to take root and thrive.

In *Raising Funds for Your School*, Nick Ryan addresses both of these requirements. Whilst providing clear non-technical advice to help heads, teachers, schools administrators and parents' groups alike to develop fundraising activities, he gives especial consideration to how to embed such activities into the life of the school, increasing their salience, their joint ownership and their chance of success.

We first worked with Nick more than a decade ago when he headed up the fundraising division at the Specialist Schools and Academies Trust. From the outset, it was clear that this was someone who knew his subject matter and was determined to advance the sector. This was a key reason why we channelled approximately £1 million into the Specialist Schools Programme. Indeed, it was particularly interesting to read the section in this book on match-funding as our 7-figure donation unlocked an 8-figure one from Government.

More recently we worked with Nick, along with other founding partners such as *The Guardian* and Baroness Walmsley, to set up Schools Funding Network. This initiative takes away a lot of the complexity found in everyday fundraising, such as Gift Aid. However, there is still no hiding away from the fact that there needs to be a significant uplift in knowledge and skills within primary and secondary education if funding potential is to be realised; it already happens in the United States so we know it can be done here. This book will provide readers with the information needed to raise those transformational amounts of funding. Indeed, it covers all elements necessary for a school to create a complete fundraising strategy. While broad-ranging and detailed in its coverage of fundraising methods, its easy, non-technical approach will make it an accessible and stimulating manual even for those entirely new to this field. I commend it warmly to all schools.

*Richard Foley*

*Clerk and Chief Executive*

*Sir John Cass's Foundation, The Education Charity for London*

*[sirjohncassfoundation.com](http://sirjohncassfoundation.com)*

# 1 INTRODUCTION

The first decade of the 21st century brought increases in school budgets and there was much investment in education. That is no longer the case. As a result, the latest generation of school children risk facing a slimmed down educational offer. For instance, a recent survey of school governors for the *Times Educational Supplement* found that:

- 1 in 3 schools said that financial constraints had led to the school's offer to pupils being reduced
- 60% of schools said that they would need to reduce spending on staff over the next 2 years
- 40% of schools had cut staff in the last year
- 30% of schools reduced the number of subjects on offer to pupils.

Yet, there are means of making up such a shortfall. Fundraising is one such way.

While the need to raise funds may appear as an additional chore, this book shows that well-planned fundraising can offer many benefits to the school. The most obvious is an increased revenue stream, which can be extremely significant when fundraising is done at scale. However, fundraising can bring an array of other advantages, such as expert advice, new contacts and political influence. By developing your fundraising, you will also help to integrate the school more closely with its community and increase general engagement levels. Indeed, you will almost certainly be surprised at all the opportunities that come your way.

*Raising Funds for Your School* is designed as a manual to help schools, no matter what level of fundraising they are engaged in or how much past experience they may have. In the introductory chapters (2-4) we look at the preliminary requirements for establishing a successful programme – assessment of the available resources, establishment of a fundraising ‘culture’ and agreement on priority needs – followed, in Chapter 5, by a brief overview of the different options for raising support. Chapter 6 then looks at different sources of funding available and the ways in which they can be accessed followed, in Chapter 7, by a discussion of the mechanics of making approaches to funders – and how, when and by whom they should be made. Chapter 8 looks at fundraising from a different angle, serving as a ‘how to’ compendium of the various fundraising opportunities

and methods first described in Chapter 5. Some users may like to treat this central section as a stand-alone manual.

Chapter 9 looks in detail at how to create a Case for Support, which is the key fundraising document in any serious fundraising campaign, and Chapter 10 lists ways in which fundraising can be ‘tweaked’ to yield even better results. Chapters 11 and 12 then consider the management of fundraising when things don’t go quite to plan, and chapters 13 and 14 look at the cultivation of donors to establish strong long-term relationships. Finally, in Chapter 15, drawing on the advice given in earlier chapters, the advanced fundraising techniques required to run Annual, Capital and Endowment Fund Campaigns are described. The book is completed by a Resources section signposting useful websites and literature.

To get the most from the book, it is recommended that you first skim-read it. This will give you a helpful overview of what can be achieved. It would then be worth focusing on one or two fundraising disciplines, either improving existing work that you are doing or developing new strands. Any more than that and you risk being swamped. Of course, once you have integrated a new fundraising stream then focus on another.

Another important point is to avoid thinking that you need to completely master all the information before you begin. Yes, being completely at ease with the techniques will undoubtedly help you but you are only likely to reach that point by putting the advice into action. So much better to reach out to donors and prospects and learn from your mistakes, using the book as a guide to dip in and out of. After all, every fundraiser is a human being and none of us is perfect!

While fundraising can certainly be stressful, particularly if you have demanding targets, it can also be great fun. Hopefully, this book will give you the knowledge to be sure that you are doing the right thing and the confidence to be yourself when talking with funders.

## 2

## THE BASICS - HOW MUCH SHOULD WE TAKE ON?

Before diving straight into your fundraising, it is worth working out what might and might not be feasible in your school.

To determine what you should be doing, consider these aspects:

- Capacity
- Expertise
- Employees versus volunteers
- History of giving
- Ability to increase capacity
- Strategic need

### **i. Capacity**

If you are a teacher who has fundraising tagged on to the main job or are just a couple of keen parents with little or no extra support then you will find it demoralising, and indeed pointless, to undertake all of the techniques and processes described in this book. On the other hand, if you have a variety of people willing to help then a range of fundraising activities becomes possible.

Where you do have many helpers, consider how they are deployed. It is much better for people to specialise so you can undertake a number of fundraising activities rather than focusing on just one. For instance, asking one or two volunteers to write funding applications rather than helping with another event should soon pay dividends.

Chapter 8 explains how the individual fundraising techniques work in practice; this background is worth reading thoroughly before taking on a new area.

### **ii. Expertise**

If you are new to a particular fundraising technique then it will take time to get up to speed. For instance, if you have never undertaken corporate fundraising and only do event fundraising then you will probably be better advised looking at other, simpler activities before approaching companies. The section Prioritising your activities – complexity and effort (Page 25) provides a list of fundraising activities rated by ease and simplicity which will help you determine where to focus your attention.

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