

Getting Started Health Check

The following is designed to help you develop a strategy and achieve your fundraising goals.

Where you see **AF** Next to a question this means you can ‘Ask FundEd**’**. Email your question to [info@FundEd.org.uk](mailto:info@FundEd.org.uk) and will try to help.

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| Priority wish list | |
| It is useful to develop a wish list you can share with potential donors and the wider school’s community. The following questions will help you to develop this. | |
| Item 1 | What are you looking to buy?  What will be the benefit to the school/children?  When would you like it by?  Where are you in the process of fundraising for this product?  Approximately how much do you need to raise?  Have you selected a supplier? **AF**  Is there any other information that might be useful? |

Add more boxes as needed

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| Secondary wish list |
| Any other products, services or activities that you would like to buy if you had the funds |
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| **AF –** we can recommend and suggest suppliers & register you for a free procurement service that can personalises quotes & compare suppliers to prove you found best value for money. |

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| Success stories & outcomes |
| In developing a strategy, it’s always useful to highlight any fundraising campaigns or activities that have been particularly successful? So that elements of these campaigns can be brought into new projects.  These past and planned campaigns should consider a range of outcomes and how these might impact the school, for example:   * Increased Funds * Increased profile of school * Creation of memories * Encourage parental engagement * Assisted curriculum related targets   By highlighting these it can be easier to gain assistance from other members of staff. |

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| Grant review | |
| Review recent grant applications and outcomes. If successful, did you follow up with the giver with an update on how the funds were spent? This will help, if you want to go back to the same grant giver again in the future.  If unsuccessful, are there any lessons to be learned? | |
| Grant 1 | Name of grant:  Grant provider:  Date applied:  Local or national:  Amount applied for:  Outcome of application: |

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| **Grant Search** |
| The FundEd Grants database is the leading resource of its type in the sector allowing you to search by curriculum area, location and key stage. In addition to national grants there are host of local grants you could search out. **AF**  **AF** - FundEd also provide online advice and checklists for putting together applications and bids.  **AF -** Ask FundEd to give a final read through of applications before sending them. |

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| Regular giving & Crowdfunding | |
| Do you currently receive regular donations or support from any of the following? If yes, how do you achieve this, how many supporters are involved are and how much is currently being raised. | |
| Parents | Yes/No  How much is the average donation? |
| Alumni (e.g. an old pupil programme) | Yes/No  How do you contact them? **AF**  Have you used social media to reach past pupils? **AF** |
| **AF?** | We can set you up on a Regular Given platform at discounted rates. This platform will handle all payments and apply for any gift aid applicable.  We can also provide a standard Privacy Notice for alumni, parents, donors and other members of the wider school community |
| Crowdfunding | Crowdfunding can be a very effective way to raise funds, particularly where you are unlikely to be considered for a grant.  You first need to work out whether the products you want to buy are crowd fundable? **AF –** these will usually be high profile campaigns with obvious benefits to pupils and will lend themselves to exciting and widely shared campaign.  Do you have a member of staff who can manage the organisation of a crowd funding campaign?  **AF** – we can help you understand whether what you want to raise funds for is suitable for crowd funding & whether your parents are likely to support it. We have detailed guides and can help you get set up with a crowd funding platform.  We can also provide examples and case studies of successful campaigns. |

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| Business partners, donors and sponsors | |
| Organisation | Who are they?  How do they support you/what have they helped you achieve?  Is this ongoing?  How do you thank them as a sponsor/donor?  The more you publicly thank and acknowledge them, the more likely they are to work with you further.  **AF –** Local businesses will have a marketing budget, if you can help them market to your parents, they can spend some of that budget with you. |
| FundingWall | **AF –** FundEd comes with a licence for FundingWall.org.uk – email us to receive your licence key and help on getting your wall started. This is a great way to reward and encourage donors. |

Add more boxes if needed

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| Online purchasing |
| Do you buy online?  How much do you spend annually?  Do you currently receive affiliate income from this spending?  **AF –** we can help you set up an account. On average retailers will donate back 2% of what you spend. In effect its free money. Often PTAs will have an account for parents, but rarely is this used by the school. |

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| Facilities hire |
| Do you currently raise money from facilities?  Do you have facilities that you know could be utilised? **AF**  Do you use a third-party company or person to support this? **AF** |

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| Parent Teacher/Friends of Association |
| Do you have a PTA or equivalent?  If yes, do you have a good relationship with them?  If no, has this been tried in the past?  **AF –** We run PTA.co.uk and can offer advice and support on setting up and working with a PTA or friends association |

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| The benefits of employing a school Fundraising Support Staff |
| It is becoming more common for schools to appoint a fundraiser either full time at the larger secondary level or part time for smaller and primary schools. In either case they can be very effective, and the support they offer business or finance managers is much needed.  Even a few hours a week can make a big difference – whether researching grants, setting up an affiliate programme, writing to potential sponsors, or liaising with a PTA group  **AF –** We have put together detailed ‘job specs’ for both part time and full time support staff, we can advise and even through our network of PTAs help you recruit and then be available to them for ongoing advice. |

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| **AF** - General Advice | |
| If you would like to ask us for advice it would be useful to include the following which will help us tailor a response. | |
| School head count |  |
| Characteristics  (i.e. inner city or rural, the main language spoken, % of pupil premium, ethnicity breakdown, wealth of area) |  |
| Personality  (i.e. what’s fun, brilliant, challenging and different about your school) |  |

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