

Lindsey Marsh

The School Fundraising Handbook

How to maximise your income from grants, sponsorship and many other sources of finance

EMPLOYEE VOLUNTEERS

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FREE RESOURCES

CROWDFUNDING
FUNDRAISING EVENTS
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GRANTS

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First published by
Crown House Publishing
Crown Buildings, Bancyfelin, Carmarthen, Wales, SA33 5ND, UK
www.crownhouse.co.uk

and

Crown House Publishing Company LLC
PO Box 2223, Williston, VT 05495, USA
www.crownhousepublishing.com

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Cover image © stickasa – fotolia.com

First published 2019.

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All information correct at the time of going to press.

British Library of Cataloguing-in-Publication Data
A catalogue entry for this book is available from the British Library.

Print ISBN 978-178583426-4
Mobi ISBN 978-178583469-1
ePub ISBN 978-178583470-7
ePDF ISBN 978-178583471-4

LCCN 2019949584

Printed in the UK by
TJ International, Padstow, Cornwall

Preface

School budgets are tight and school leaders are under increasing pressure to generate their own income. There are over 32,000 schools in the UK alone, all being challenged to find new ways to raise and save money in areas such as ICT, the arts, environmental projects, sport and extra-curricular activities.

The government has a statutory responsibility to fund education in England, so state schools should only need to fundraise to provide *extra* income, not to subsidise core services. However, according to the Institute for Fiscal Studies, schools have experienced a real terms cut of 8% in per pupil funding since 2010.¹ As a result, many schools are reportedly turning to crowdfunding to raise money for basics such as textbooks, pens and pencils, as well as sports facilities and playgrounds.² Understandably, many charitable trusts are unwilling to step in to fund services that should be paid for by government.

Although most schools are aware of the benefits of fundraising, many aren't fully informed about the range of grants, schemes and other support available. While it is the role of the school business manager to generate income, many are often so overloaded with other essential tasks that there is often limited time to spend on fundraising. Teachers, support staff, governors, students and other members of the school community can also apply for help for their school. However, if they are not fully aware of the opportunities on offer, or do not feel sufficiently confident to apply for such schemes, then valuable funding sources can be missed.

The research shows that not all schools are utilising the opportunities available to them. For example, a report by Kellogg's suggests that more than three-quarters of schools (78%) never use food redistribution charities.³ This is a shame because by accessing this type of support schools can redirect their finances into teaching and learning.

This book aims to help schools become better informed about the resources available to them, and to raise awareness of all the wonderful charities and organisations that are willing to support schools and other educational establishments. *The School Fundraising Handbook* offers key contact information for over a hundred grants, as well as tips, statistics and key information, so that even the most inexperienced fundraiser can feel confident when raising money for their school.

1 L. Tickle, School Cuts: 'Children Now Raise Money for Their Own Education', *The Guardian* (14 August 2018). Available at: www.theguardian.com/education/2018/aug/14/school-cuts-children-raise-money-own-education.

2 N. McIntyre and R. Adams, More Than 1,000 English Schools Turn to Online Donations to Raise Funds, *The Guardian* (9 April 2019). Available at: www.theguardian.com/education/2019/apr/09/cash-strapped-english-schools-turn-to-online-donations-to-close-funding-gap.

3 Kellogg's, *No Food for Thought: The Impact of Hunger in UK Classrooms* (2014), p. 23. Available at: www.kelloggs.co.uk/content/dam/europe/kelloggs_gb/pdf/R1_Kelloggs%20No%20food%20for%20thought.pdf.

Grants have the potential to generate the biggest supplementary income for schools, so Part I is dedicated to this area. Part II offers more specific help for fundraising and managing key school projects, and Part III offers ideas to help your school not only to raise money but to save money too. Although it is predominately written for schools, most of the information provided is also relevant to nurseries, pre-schools, colleges, universities and other education providers. The tips provided in this book will not automatically lead to your funding application being accepted; however, they will improve your chances of success. Always make sure that you follow the funder's guidelines when submitting your bid.

Transparency and ethics matter in an era of instant communication, so schools should consider any philanthropic funding very carefully. Businesses often provide donations, goods and services as part of their corporate social responsibility (CSR) policy, the purpose of which can be both altruistic and strategic. Positive public relations can raise the profile of a company in the minds of consumers *and* boost long-term profits. This issue is particularly acute in schools where there is a captive young audience of potential future customers. There is no reason why schools should not take advantage of the funding and support on offer from businesses, but they should also be aware of what the company is getting in return. Thoughtful evaluation and due diligence are required to ensure that the principles, goals and values of the donor match those of the school.

By regularly devoting time to fundraising, schools can open the door to new money that can help to raise standards and enable transformations to happen. Fundraising doesn't have to be complicated or take up too much time, but if done on a regular basis it can be very valuable, breathing life into projects so that students can continue to receive the very best education possible.

Funding programmes often inspire creativity – and donors like to fund exciting and unusual ideas! This can motivate schools to develop innovative solutions and groundbreaking ideas that will not only help their school but support other schools too.

Fundraising can also encourage schools to forge stronger partnerships with members of the wider community. By applying for grants, for example, schools are inviting potential funders to work with them on projects in areas where they both have a mutual interest. This gives charities and other donors the opportunity to use their money to be part of the school community and to make a real difference.

Not only can fundraising be a positive challenge but it can also be very rewarding, especially when bids are won, ideas become a reality, fun events are organised, improvements are made and successes are celebrated.

Disclaimer: The details in this book are provided as guidance only. It is advisable to contact the relevant organisations for full, up-to-date information and to assess each opportunity for your school or context (be sure to seek professional advice where necessary). The author is not responsible for the content of third-party websites and is not affiliated with any of the organisations listed.

Acknowledgements

I would like to dedicate this book to my family, in particular my two beautiful children – Shannon and Danny. I love you both more than words can say.

I would also like to say a special thank you to my mom and dad for being so supportive.

Also, thank you to my lovely friend and school business manager mentor, Hayley Dunn. Thanks for your friendship and for teaching me so much.

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Part I

Applying for Grants



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Chapter 1

Introduction to grants

There are lots of grants available to schools. Grants are non-repayable sums of money, so they do not have to be paid back. They are usually a form of restricted funding, which means that the money must be used for the specific purpose for which it was donated. Grants can be awarded for a range of purposes – for example:

- Promote sports activities and exercise.
- Buy equipment such as computers and photocopiers.
- Install energy efficient technologies like photovoltaic (PV) solar panels.
- Buy resources to help young people with special educational needs and disabilities.
- Improve the school building and grounds.
- Support staff with professional development opportunities.
- Enhance the teaching of specific subjects such as maths, English and science.

A range of different grants are available. Here are some key terms you are likely to come across:

- Capital grants: These are awarded to help recipients purchase tangible goods which become assets, such as vehicles and buildings.
- Project cost grants: These are given to help cover the cost of running a specific project. This may include staff salaries, equipment and a small percentage towards any direct overheads.
- Revenue grants: These are awarded to help cover the costs of key outgoings, such as rent, rates and utilities (these are sometimes referred to as 'core costs').
- In-kind support: This is a non-cash contribution to a project, which might include materials and services, consultancy, the use of company facilities and product donations.
- Match funding: This refers to funds that are awarded to equal the amount raised by another source or activity. The value of in-kind contributions is often accepted as match funding too.

Grants can be given by individuals or organisations such as charities, businesses and local councils.

Charitable trusts and foundations are non-profit organisations which give voluntary help to those in need. Schools can usually apply for support from both national and regional

charities, including local educational trusts. The help on offer varies, but may include monetary grants and donations of goods or time. As well as donating gifts, many charities also aim to raise awareness of the causes they care about and the difference they are making.

There are over 168,000 charities in England and Wales alone, donating approximately £30 billion annually.¹ Charities derive their income from a variety of sources, including legacies, shares, fundraising events, Gift Aid donations, payroll giving, charity shop sales and so on. Some charities also distribute and administer funds on behalf of others. Most charities are run by a dedicated team of employees, alongside volunteers who give up their time to help others. Each charity is overseen by a board of trustees which works in accordance with a governing document. This is a legal document which sets out the charity's objective or purpose and how it will be administered. Most charities are regulated by the Charity Commission, a statutory body which holds them to account in accordance with the law.²

Each year charities must, by law, submit their annual returns (if their income is above a certain threshold) to a central register of charities, which are maintained by the Charity Commissions for each of the UK regions (their websites are listed below). The register can be searched online (for free) and is a quality source of information for any fundraiser. It provides details about charities' work and aims, along with finance information, trustee details, contact information and more.³

Here are the details of the Charity Commissions for England and Wales, Northern Ireland and Scotland:

Charity Commission for England and Wales

www.gov.uk/government/organisations/charity-commission
0300 066 9197

Charity Commission for Northern Ireland

www.charitycommissionni.org.uk
0283 832 0220

Scottish Charity Regulator

www.oscr.org.uk
01382 220446

You can find more information about grant-makers (including details about what they fund) by visiting the 360 Giving website: www.threesixtygiving.org.

1 See www.gov.uk/government/publications/charity-register-statistics/recent-charity-register-statistics-charity-commission and www.channel4.com/news/factcheck/how-much-charities-spend-good-causes.

2 This law is set out under the Charities Act 2011. See www.legislation.gov.uk/ukpga/2011/25/contents.

3 The register can be found at: www.gov.uk/find-charity-information.

You can learn more about the voluntary sector and access a range of data and statistics via the National Council for Voluntary Organisations (NCVO) website: www.ncvo.org.uk. Funding Central also provides information on grants from local, national and international funding sources: www.fundingcentral.org.uk.

Aside from charities, many businesses offer grants as part of their corporate social responsibility (CSR) commitments. Not all companies are in a position to give, but those that do give for a variety of reasons, including giving something back to the area they serve, helping good causes and being seen to be doing the right thing. As well as donating money, many offer product donations, the use of company facilities, employee volunteers, expertise and more.

Grants are also awarded by lotteries. For example, since 1994 the National Lottery has raised over £40 billion for good causes across the UK.⁴ These funds are distributed by 12 independent organisations and are given to a variety of arts, sports, heritage, charitable, voluntary, health, education and environmental projects. To learn more about lottery funding and to access a list of lottery distributors contact:

National Lottery Good Causes

www.lotterygoodcauses.org.uk

0845 275 0000

Grants are also awarded by local Community Foundations⁵ and by the Council for Voluntary Service organisations, details of which can be found here:

**National Association for Voluntary and Community Action (NAVCA)
(England)**

<https://navca.org.uk>

0114 278 6636

Northern Ireland Council for Voluntary Action (NICVA)

www.nicva.org

0289 087 7777

Scottish Council for Voluntary Organisations (SCVO)

<https://scvo.org.uk>

enquiries@scvo.org.uk

0131 474 8000

⁴ See www.lotterygoodcauses.org.uk.

⁵ See www.ukcommunityfoundations.org.

Wales Council for Voluntary Action (WCVA)

www.wcva.org.uk

funding@wcva.org.uk

0300 111 0124

As well as providing advice and support, charities often distribute funds on behalf of donors and award grants to address local needs.

Each year local councils set aside a budget to help causes within their locality. Councils are local government organisations and include county councils, city councils, town councils, parish councils and so on. According to the National Association of Local Councils, there are 10,000 councils in England.⁶ Councils usually receive funds through the Council Tax paid by local residents and from other income streams, such as hiring out council facilities. Council grants can range from £20 to £2,000 and may be used to organise events, purchase equipment, cover running costs, or fund training programmes and trip transport costs.

Schools can also contact local councillors, who often have a Pride Fund for community projects in their area. Grants typically range from £50 to £2,000. You can usually find their contact details (including email address) via your local council website.

As well as all these grant-giving organisations, grants are also distributed through government bodies and agencies. They are also offered by town mayors, Lions Clubs, Rotary Clubs and more.

⁶ See www.nalc.gov.uk/about/who-we-are.

Chapter 2

Overview of the grant application process

If you are new to applying for grants, then you may like to know what is involved in the process. This chapter will take you through the steps an applicant may need to take to apply for a grant and successfully manage the award.

1. Research potential funders and learn about any grants available. For example:
 - Visit the funder's website.
 - Read any grant policies.
 - Read any guidance notes.
 - Check the answers to any frequently asked questions.
2. Assess how well the project meets the funder's priorities. For example:
 - View the award criteria.
 - Take an eligibility test (if offered).
 - Contact the funder for further information (if the funder invites this).

If a potential grant has been identified:

3. Applicant applies for the grant, following the funder's instructions. For example:
 - Stage 1: Submit an expression of interest.
 - Stage 2: Submit a full application (including any requested documents).
4. Grant assessor reviews the application and requests any additional information. They may telephone or write and even request to visit your establishment.
5. Trustees discuss the application at the next board meeting and make a decision (sometimes the applicant is required to be present at the meeting).
6. Applicant receives a decision (or follows this up).

If the application is successful:

7. Applicant receives notice of the grant award (usually by email).

8. Applicant responds by:
 - Reading the terms and conditions.
 - Signing any grant agreements.
 - Sending an appreciation letter and inviting the grant-maker to visit the school.
9. Grant is transferred into the agreed bank account (i.e. usually by bank transfer within 30-days of award notice). Alternatively, a representative of the organisation may prefer to award a cheque at a presentation ceremony.
10. Applicant uses the grant and manages the project as agreed, ensuring to:
 - Publicise the award.
 - Take photographs of the different stages of the project.
 - Monitor the project and measure the outcomes.
 - Keep receipts and any evidence of how the grant has been spent.
11. Applicant keeps the funder updated and submits grant progress reports (e.g. every six months).
12. Once the project is complete, the applicant:
 - Evaluates the project.
 - Completes a post-grant report to give an account of the project and present the outcomes.
 - Submits any information the funder requests (e.g. copies of receipts).
 - Celebrates the work achieved.
13. The funder officially closes the grant.
14. The applicant manages the relationship well and checks whether they are eligible to apply again.

As every grant-giving organisation is unique, they will all have their own distinct set of rules which applicants must follow, so you will need to clarify the process with each funder.

Chapter 3

Identifying grants

With so many grants available, seeking out the ones which are most relevant to your school can seem like a daunting task. Not all organisations accept applications from schools, some only cover a certain geographical area and others only support certain projects. While this book provides details of over a hundred grants, there are many more out there beyond these for which schools could potentially apply.

Grants can be found by:

- Searching online and visiting funders' websites or the Charity Commission website.
- Asking around – perhaps a member of your school community knows of a suitable grant.
- Reading your local newspaper, where grant opportunities may be publicised.
- Asking other schools if they know of any suitable funding programmes.
- Enquiring with any organisations your school may be part of, such as school clusters or the local authority.
- Contacting your local library, Community Foundation or Council for Voluntary Service for help, as they often have access to grant directories.
- Asking suppliers – some offer a free grant-finding service and some even have grant programmes exclusively for their customers.
- Asking grant-makers – they may be able to signpost you to other funders.
- Seeking help from professional fundraisers.
- Contacting income generation agencies for help.
- Attending fundraising training sessions, exhibitions, conferences and events.
- Reapplying to funders that you have applied to in the past.
- Reading posts or asking questions on social media sites and online forums. On Twitter, for example, you could use:
 - Educational hashtags: #SchoolBusiness, #education, #schools, #PTA, and for school leaders and business managers: #SBLtwitter, #SBMtwitter, #SBM (school business manager), #SBL (school business leader), #SLT (senior leadership team).

- Fundraising hashtags: #EdGrant, #SchoolFundraiser, #SchoolFunding, #HelpOurSchools, #fundraising, #fundraiser, #grants, #donate, #ForACause, #GoodCause, #GoFundMe.
- Hashtags relevant to your project: #children, #students, #KidsMatter, #disadvantaged, #SEND (special educational needs and disability), #SENDcrisis, #EAL (English as an additional language), #ECE (early childhood education), #inclusion, #equality, #bullying, #art, #EdSust (educational sustainability), #EdTech, #EdApp, #ICT, #STEM (science, technology, engineering and maths), #music, #HistoryTeacher, #GeographyTeacher, #PhysicsEd, #PlayOutdoors.
- Hashtags for weekly discussions and live chats: #EdChat, #EduChat, #UKEdChat, #EdFinChat, #SpEdChat (special educational needs), #SLTchat, #CharityTuesday, #TT (teacher Tuesday), #TLChat (teacher librarians).
- Your local area's dedicated hashtag: e.g. #WestMidlandsHour is on Tuesdays between 8 and 9pm.
- You can also connect with others and share tips by using the official hashtag for this book: #SchoolFundraisingHandbook.
- Some Twitter accounts you may like to follow include: @fundraising, @FundingCentral, @FundEd4schools, @Get_Grants, @GRANTfinder_uk, @GrantFunders, @Grants4Schools, @GrantsOnline, @loftweets, @PTApatteer, @SchoolFundingUK, @UKCF_tweets, @ukfundraising.

There are also grant databases, magazines and other resources that fundraisers can subscribe to or buy. Education shows also provide opportunities to network and learn more about income generation.

Grant databases

FundEd

www.funded.org.uk

info@funded.org.uk

This database offers information on funding from a range of grant-giving trusts and lists data by curriculum or interest area. There is an annual fee to access it (£90 +VAT at the time of writing). Please contact FundEd for more information.

Funding Central

www.fundingcentral.org.uk

fundingcentralhelp@ncvo.org.uk

Through one search, fundraisers can access information on thousands of grants. The database is free to access for small charitable and voluntary organisations

(such as parent–teacher associations (PTAs) and friends groups); however, there is a subscription fee for organisations with an annual income of over £100,000.

GRANTfinder

www.grantfinder.co.uk

GRANTfinder is a subscription service which offers a comprehensive database of key funding opportunities across the UK. It also provides support throughout the funding process from identification to application and management. Please use the contact form on their website to book a demo or to request further information.

Grants Online

www.grantsonline.org.uk

info@grantsonline.org.uk

This online database was established in 2001 and currently offers information on nearly 5,000 funding schemes in the UK. The organisation also provides up-to-date funding information, alerts and newsletters. There is a subscription fee to access the full list (£20 + VAT for individual access for one month).

Fundraising publications

Directory of Social Change

www.dsc.org.uk

cs@dsc.org.uk

0207 697 4200

The Directory of Social Change offer a range of useful publications, including funding directories and best practice guides. They also offer a range of grant databases and training programmes.

FundEd Magazine

www.funded.org.uk

info@funded.org.uk

01342 718679

As well as offering a grants database, FundEd publish a magazine every term. Fundraisers can either pay an annual subscription for both the magazine and database or pay a smaller fee to subscribe to the magazine only. *FundEd Magazine* offers tools and advice to help schools generate income as well as details of current grants and competitions.

A carefully compiled treasury of tips, tools and key contacts to help schools in the UK save money, boost their income and manage their fundraising projects.

Covering grants, crowdfunding, event planning, recycling schemes, corporate support and much more, Lindsey Marsh's indispensable guide throws schools a lifeline by revealing the abundance of fundraising streams available to them and sharing shrewd advice on how to coordinate specific projects and initiatives successfully.

Lindsey also uses her fundraising expertise to guide readers through the grant application process from start to finish, so that even the most inexperienced fundraiser can feel confident about seeing their projects through to fruition.

An invaluable resource for school leaders, school business managers and anyone involved in fundraising in the education sector.

A well-thought-out book, written as an accessible, easy-to-read and practical guide filled with pragmatic insights and handy tips and ideas to try. It will prove to be a useful resource for all those involved in school fundraising, and can be read either from start to finish or by selecting the area that is most relevant to your plans for income generation.

**Hayley Dunn, school business leadership specialist
and author of *The School Business Manager's Handbook***

The School Fundraising Handbook provides sound practical advice on how to prepare an attractive bid and it is also intelligently organised, which makes it easy to find information relevant to the reader's specific areas of interest. I will definitely be applying many of the principles and ideas, and I believe they will be of direct benefit to our students.

Adam Briggs, Head of Geography, Charlton School

Lindsey leaves no stone unturned in *The School Fundraising Handbook*, which is packed full of advice for schools looking to maximise their income streams. This is so much more than just a book about grant applications, however. Lindsey explains how to research and plan projects such as setting up a school library, developing a new or existing playground area, investing in educational technology, and many more. She also shares practical suggestions for evaluating the way a school approaches its spending priorities.

Mark Gibbons, Head Teacher, Windmill Primary School

Lindsey Marsh's career in fundraising began in 2005 and she has since raised thousands of pounds for local schools and charities in Shropshire. Lindsey has also previously run her own business, and won recognition and funding for two enterprise start-up projects during her media and business management studies.

