

# A BRIDGE TOO FAR?

The Increasing Role of Voluntary Action  
in Primary Education

**ALISON BODY & EDDY HOGG**







“Voluntary action itself is good practice but has always been for extra-curricular and special projects. The concern is that we are now having to raise money for basic necessities due to cuts.”

“Voluntary action is a necessity to bridge the gap and the decreasing funding we are receiving... But is this something we really want our schools to be focusing on? Surely they should be focused on the education and development of our children. Our backs are against the wall – it looks like we will increasingly have to do this, but it is not a teacher’s core skillset and arguably it shouldn’t have to be.”

“Voluntary action in school generally enhances what we are able to offer. It used to be ‘the icing on the cake’ but now it is sometimes used for more core activities as well.”

“Volunteers are a massive cost saving for us, we’ve had to let most of our support staff go, and we’ve actively replaced them with volunteers – it’s not right but it is necessary given the budget constraints we face.”

**(Headteachers, 2018)**

# ACKNOWLEDGEMENTS

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# ABOUT THE AUTHORS



## Dr Alison Body

Alison is the Faculty Director for Early Childhood in the Faculty of Education at Canterbury Christ Church University. Previously having worked in senior management positions across the voluntary sector, including positions of fundraising, business management, commissioning and strategic development, she is particularly interested in the relationship between voluntary action, the third sector and how this impacts the lives of children, young people and their families. She has conducted research on the relationship between the state and third sector, voluntary action and philanthropy. She teaches on a range of courses relating to childhood, the voluntary sector and education.



## Dr Eddy Hogg

Eddy is a Lecturer in Social Policy at the University of Kent and a member of the Centre for Philanthropy. His research looks at volunteering, charitable giving and public attitudes to the voluntary sector. Recently he has worked on research looking at charitable giving and volunteering in schools, on youth volunteering, on the value of charity involvement in supporting young people, public on attitudes towards charity regulation in England and Wales, and on charity engagement with the Fundraising Regulator. He teaches a range of courses at undergraduate and postgraduate levels on the voluntary sector and volunteering

# EXECUTIVE SUMMARY

**1.** Since we published *To bridge the gap? Voluntary action in primary education* in 2016, the issue of voluntary action to support schools has become one of the most hotly discussed topics in education. Driven by cuts to school budgets and increased costs, parents, campaign groups and the media have expressed concern that schools are increasingly turning to voluntary donations of time and money to support their core and non-core activities. This report offers a timely update to our 2016 work, revisiting the original sample of primary schools in a local authority in England, to see how things have changed over the past two years.

**2.** As in 2016, we have analysed the financial data from 306 primary schools in a single local authority area. Further, in a repeat of our 2016 methods we distributed a survey to Head-teachers and Chairs of Governors at each school, with a 23% response rate, and conducted follow up interviews with 10 Head-teachers and Chairs of Governors. New in this study is the inclusion of Parent Teacher Association data obtained from the Charity Commission, as where PTAs are registered separately to schools their finances exist separately to school financial data. This enables us to present an even more detailed and accurate picture of voluntary action in schools.

**3.** The first area of change we identify is that **the amount of voluntary action in primary education is increasing**. This is true for both donations of money and time. For the former, the amount schools raise on average has risen from £41 per pupil, per year in 2016 to £51 per pupil, per year in 2018, increasing to £94 per pupil when we consider PTA income. For the latter, the amount of volunteer time schools receive has increased from 12.5 minutes per pupil, per week in 2016 to 21 minutes per pupil, per week in 2018. Schools have achieved these increases through a more strategic focus on targeting their fundraising activities on less traditional sources such as businesses or foundations, and by taking a whole-school approach to volunteer recruitment.

**4.** The second area of change is that we are seeing several **breakaway schools with a strong culture of philanthropy** embedded throughout the school, which are significantly moving ahead of the other schools in terms of voluntary action. A culture of philanthropy means ensuring that the wider school community are aware of the benefits of voluntary action and what requirements the school has, and this is essential – although not enough on its own – for schools to break away.

The highest fundraising schools raised nearly £600 per pupil, per year in 2018, more than doubling the highest figure of £250 per pupil, per year in 2016. The highest fund-raising 1% of schools now raise 10% of the total amount raised by all schools in the local authority.

**5.** Linked to the previous finding, our third area of change is that **the gaps between schools are widening**. While some schools break away, others are standing still. Most notably, this gap reflects existing patterns of deprivation. Schools in the wealthier<sup>1</sup> half of areas attract over twice as much donations of both money and time as schools in the more deprived half of areas. While embracing a culture of philanthropy has benefits for all schools, those in wealthier areas benefit far more further amplifying inequalities in education.

**6.** The final area of change we identify is that the push to attract more voluntary action is brought about by **necessity rather than choice**. The proportion of schools who said they were reliant on fundraised income to deliver core statutory education (day to day teaching activities) provision rose from 28% in 2016 to 43% in 2018, while the proportion of schools who rely on fundraised income to deliver general school activities (wider curriculum enhancing provision) has risen from 52% in 2016 to 75% in 2018. This increase reflects a troubling trend in school funding, with budget pressures forcing schools to explore alternative funding sources.

**7.** In conclusion, we celebrate the growth in voluntary action over the past couple of years, the result of significant strategic and tireless approaches taken by schools. However, we are cautious for three reasons:

- Firstly, the driver behind these efforts is declining budgets due to decreased statutory funding, and increased budgetary spending pressures.
- Secondly, we are seeing a growing gulf between the schools who can access significant resources of time and treasure in the communities and those who cannot.
- Thirdly, schools are increasingly having to do more than just educate and are raising money and recruiting to provide social welfare support for pupils and the wider community.

**We are concerned that as this escalates, inequalities will grow and elements of what schools do will become privatised by stealth.**

<sup>1</sup> Areas wealth based on the English indices of deprivation  
<https://www.gov.uk/government/statistics/english-indices-of-deprivation-2015>

# INTRODUCTION

The issue of school funding has been one of the most discussed topics in education over the past few years. Increasingly, schools have been looking for ways in which they can squeeze as much as possible out of their existing budgets and raise more funds to boost those budgets further. In doing so, many have looked to voluntary donations of time and money as a solution. This is what led, in 2016, to us conducting the first significant piece of research into voluntary action in schools conducted in England.

While voluntary action has a long and established role in education in England, the scale on which it is currently occurring is beyond any seen since the state took responsibility for education provision in the early 20th Century. This is primarily the result of declining school budgets, with the Institute for Fiscal Studies estimating that school budgets have fallen by 8% in real terms between 2009-10 and 2017-18.

Since we published *To bridge the gap? Voluntary action in primary education* in 2016, debates around the role that voluntary action plays in the provision of state education have intensified. Campaign groups such as Worth Less?, School Cuts and Fair Funding for All Schools have highlighted the growing demands on parents and other community members to donate to fund children's education, while the media has covered local and national stories about increased requests to support school budgets:

**Hundreds of schools are using Amazon wish lists to fund basic supplies**

- *Huffington Post*, 17th June 2018

**The UK has turned the right to education into a charitable cause. How 19th century**

- *Guardian*, 24th April 2018

**Schools collect millions in donations as state funds stagnate**

- *Channel 4 News*, 5th January 2018

**School in Theresa May's constituency seeks £1 for pens**

- *BBC News*, 16th November 2017

**Four in 10 parents 'asked to give to school funds'**

- *BBC News*, 22nd September 2017

The extent of the interest in this topic makes this update on our 2016 research extremely timely. We have revisited the same data sources we used in 2016, including financial data from all primary schools in a local authority area, a survey sent to Head-teachers and Chairs of Governors of all the primary schools, and follow up interviews with a selection of schools.

Additionally, we have looked at school Parent Teacher Associations' financial data accessed through The Charity Commission, which allows us to include money raised on behalf of schools as well as money raised directly by the school.

This report begins by recapping the headline findings from our 2016 research. Next it gives a brief overview of the current context for school funding in England, and the methodological approaches adopted in this research. The main substantive sections of this report concentrate on the four most significant areas of change identified since 2016:

1. The amount of voluntary action in primary education is increasing;
2. We are seeing several breakaway schools with a strong culture of philanthropy embedded throughout the school;
3. The gaps between schools are widening;
4. The push to attract more voluntary action is brought about by necessity rather than choice.

We conclude by celebrating the growth in voluntary action over the past couple of years, the result of significant strategic and tireless approaches taken by schools, while also highlighting reasons to be cautious.

We hope that this report will prove a valuable resource both to those who wish to understand better the challenges facing schools and to those who want to explore solutions to meet those challenges.



# SUMMARY OF THE 2016 DATA

Our 2016 report *To bridge the gap? Voluntary action in primary education* was the first significant piece of academic research to measure the extent and distribution of private donations to primary education in England.

We found that voluntary action – the giving of time or money – was widespread within primary schools, with many examples of schools where generosity was resulting in increased opportunities for pupils. Across the local authority under examination, on average schools received **12.5 minutes** per pupil per week of volunteer time and **£43** per child per year of donated money. This support helped schools to deliver excellent teaching, to provide children with positive role models, to build links with the local community and to supplement school budgets.

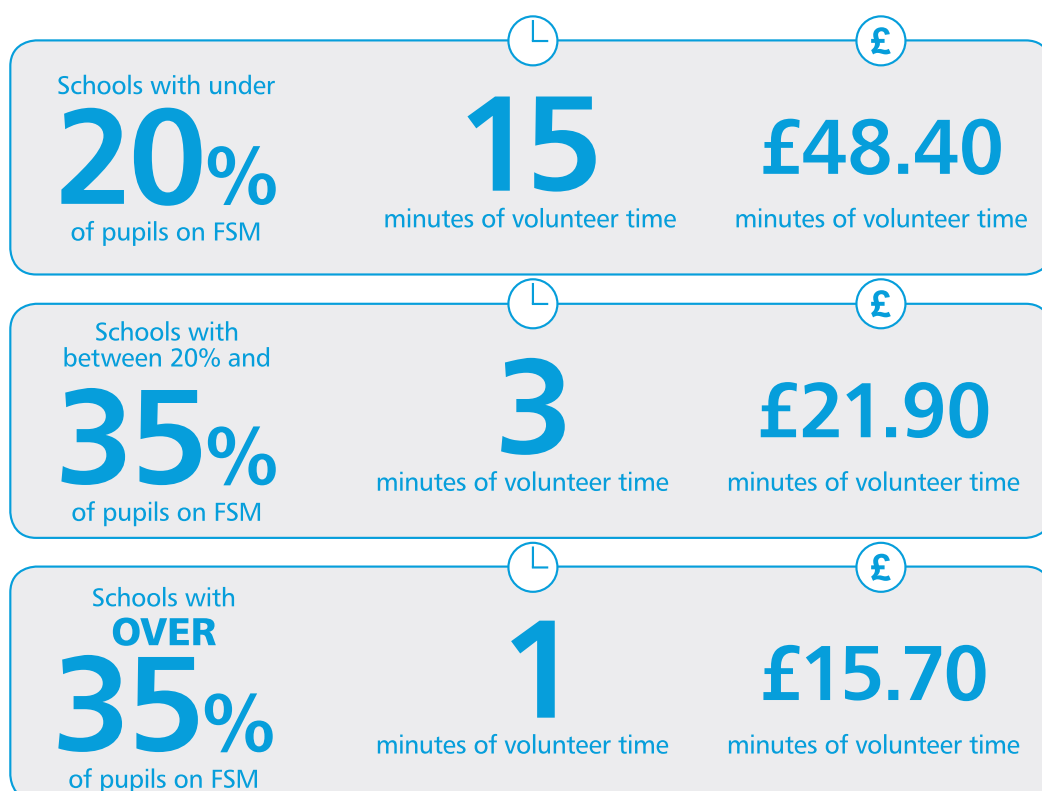
However, we also found significant inequalities between schools. Per pupil, volunteer time ranged from **72 minutes** a week in some schools to **less than a minute** in others, while donated money ranged from **£250** a year to **none whatsoever**.

While a number of factors influenced how much voluntary action schools attracted, including school size, school type and the leadership ideology of the school, the relative affluence of the school (measured by the proportion of pupils on free school meals) emerged as the most significant factor.

Despite these inequalities, or perhaps because of them, we found that the majority of schools were keen to increase the amount of voluntary action they received. **75%** of schools were actively trying to increase the amount of volunteers they had and **66%** were actively trying to increase their fundraising income.

Broadly speaking however, why schools engaged in voluntary action fell into four over-arching categories, viewing voluntary action as either a mechanism for survival, a nicety to enhance the school community, a positive ideological choice in terms of increasing competition to enhance education quality, and finally as a direct challenge to ideological norms and a set of activities school should not be engaging with.

The 2016 report concluded that primary education is far from being a level playing field when it comes to securing additional resources and that there are substantial differences in how voluntary action is distributed across areas of advantage versus those of disadvantage. While we were keen to celebrate the substantial benefits that voluntary action can provide to schools and their pupils, we were concerned that the consequences of this uneven distribution could serve to exacerbate existing inequalities, particularly if voluntary action plays an even greater role going forward.



# THE CURRENT FINANCIAL SITUATION FACING PRIMARY SCHOOLS

In December 2016, the Department for Education announced plans for a new National Funding Formula<sup>2</sup> for schools in England, replacing the 152 different local authority funding formulae with one single formula. Such was the scale of the plans that the Institute for Fiscal Studies described them as, ‘the most ambitious reform to the school funding system for over 25 years’<sup>3</sup>.

The case for reforming the school funding system is that similar schools should receive similar levels of funding regardless of where they are in the country. Variations in funding per pupil across similar schools in different parts of the country have resulted from two main reasons: (i) grants provided to local authorities are based on out-of-date information, privileging historical disadvantage over present; and (ii) local authorities make different choices about how to spend finite budgets.

**13 different factors will be now used to allocate funding to schools, clumped together in four ‘building blocks’:**

- per-pupil funding of at least £3,500 per pupil per year for primary schools and £4,800 for secondary schools;
- additional needs funding based on pupils’ socio-economic deprivation, low prior attainment, English as an additional language, and numbers joining throughout the year. This is referred to as the ‘pupil premium’;
- school-led funding, with lump sum with additional money allocated to small or isolated schools, and on the basis of premises-related factors and expected growth in pupil numbers;
- geographic funding, with ‘weighting’ based on the school’s location.

These criteria were designed with the purpose of ensuring a more equal distribution of state funding among similar schools across the country. Some schools will benefit from bigger budgets, while others will see their funding cut.

Schools and unions have been campaigning against the enforcement of the new system in April 2018, arguing that cuts to some schools’ budgets are not the solution when school budgets are in crisis. A survey of 1,500 Head-teachers by the lobbying campaign Worth Less? found 90% of schools are having to use part of the ‘pupil premium’ allocated for disadvantaged pupils to fund core budgets, 80% are cutting numbers of teaching assistants and support staff, and 60% are removing teaching posts to balance budgets<sup>4</sup>.

The Institute for Fiscal Studies estimated that ‘school funding per pupil has fallen by 8% between 2009–10 and 2017–18, resulting in a real-terms cut of 8%’<sup>5</sup>. Unfunded costs such as higher employer pension and National Insurance contributions will bring real-terms cuts closer to 8% between 2014–15 and 2019–20. This may return school spending per pupil to about the same real-terms level as it was in 2010–11.

The government has put in place a transitional protection limiting budget loss per pupil to 3% in cash terms in the first two years under the National Funding Formula, but it is not clear how adjustments will be made for around 1,000 schools at 7% above the funding level to come under the formula.

Implementing this reform at a time when there is already considerable pressure on school budgets will inevitably be difficult. While the desire to make school funding more equitable across the country is laudable, there is concern that the new formula will leave the majority of schools even worse off than previously. In this context, it is not surprising that schools are placing more emphasis on voluntary action as a means of boosting school budgets and providing additional resources.

2 Department for Education (September 2017) *The national funding formula for schools and high needs*. Policy document.

3 Institute for Fiscal Studies (2017) *The short- and long-run impact of the national funding formula for schools in England*. IFS Briefing Note BN195, Nuffield Foundation.

4 Weale, S. (2018) ‘New funding system leaves schools worse off, say headteachers’, *The Guardian*, 8 May.

5 Institute for Fiscal Studies (2018). Comparing school spending per pupil in Wales and England, 12 July 2018

# METHODOLOGY

In 2016, our initial research sought to explore the role of voluntary action in primary education. Establishing a baseline of activity in the initial research project, this follow up study sought to ask, is voluntary action in primary education increasing? To answer the question, we have adopted a mixed methods approach which focused on five central data sources:

1. The financial data of 306 schools from a local authority area in the South East of England, obtained from the Department for Education's financial benchmarking data. This provided data on a school's total income, donated income directly received by the school, number of pupils, pupil premium funding, OFSTED rating, and allowed us to correlate these factors with index of multiple deprivation data.<sup>6</sup>
2. The financial data of the Parent Teacher Associations (PTAs) associated with these schools. Where PTAs are registered charities, this data was obtained from The Charity Commission. Where PTAs are registered charities or operate as independent non-profit groups, their finances exist separately to the school's benchmarking data.
3. School websites and publicly available information were reviewed to gather further information on voluntary action in the school, volunteer policies and PTA activities.
4. 70 surveys (23% of the sample) completed by Head-teachers or the Chair of Governors from the sample of schools, which allowed us to gain a sense of insight into school activity, prioritisation and views on voluntary action in education.
5. 10 semi-structured interviews with Head-teachers or the Chair of Governors from the sample of schools, which provided in-depth case study analysis into the realities of school's experiences of voluntary action in primary education.

Whilst the data has provided some rich findings, explored in this report, we acknowledge some caveats which must be considered, for example:

- There is some inconsistency in how schools record 'donations': where donations are in kind, for example new play park equipment, this 'gift' often does not appear in the accounts. We therefore speculate that much donated income (i.e. in kind or gifts) remains 'hidden'.
- PTAs do, at times, 'donate' financial gifts to the school. Where accounts have provided enough data to ensure we are able to eliminate double counting of this income, we have; however, we also take care to distinguish between donations directly to the school and fundraising activity by the PTA in our analysis.
- Whilst most PTAs records cover the same accounting period as their partner schools, some adhere to other accounting periods. In these cases, we have taken the closest accounting year for comparison purposes.

<sup>6</sup> Financial data is based upon schools budgets as recorded for 2016-2017. The 2016 report financial data was based upon 2013-14 budgets. We report these for comparison under 2016 data and 2018 data.

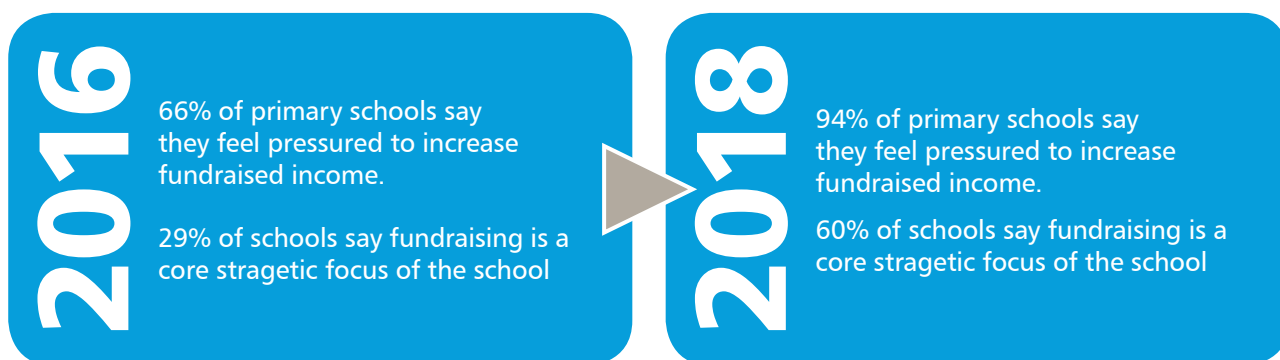
# SIGNIFICANT CHANGE 1

## Voluntary action in primary education is increasing

Faced with an increasingly challenging economic, social and political environment, schools are successfully increasing the voluntary contributions – whether that be people's time, money or gifts – they receive. The overall quantitative data shows sharp increases in fundraised income. This has been driven by the majority of the schools surveyed taking purposeful action in order to attract more donations, and these actions have been rewarded with positive results. Whilst we acknowledge in this report the problems that the unequal distribution of voluntary resources can give rise to, we do not seek to detract from the amazing efforts Head-teachers, Governors, school staff and volunteers go to, in order to provide quality core education, additional support and enrichment activities for the children they seek to serve.

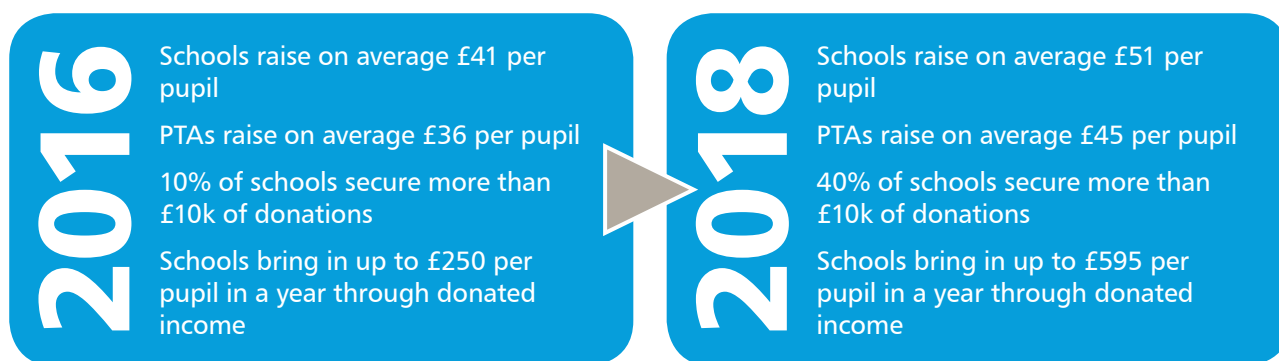
### Schools feel increased pressure to engage in voluntary action

Our research clearly identifies that voluntary action in education is increasing, in terms of focus, prioritisation, increased expectations on volunteers and amounts of fundraised income. Indeed, based on the most recent survey data, 70% of schools report that they feel pressured to now seek additional volunteer support. There is even more pressure when it comes to fundraised income, with more and more schools turning to donations to boost budgets: the number of schools who say they feel pressured to increase fundraised income rose from 66% to 94% between 2016 and 2018, and the proportion of schools which say fundraising is a core strategic focus more than doubled, rising from 29% in 2016 to 60% in 2018.



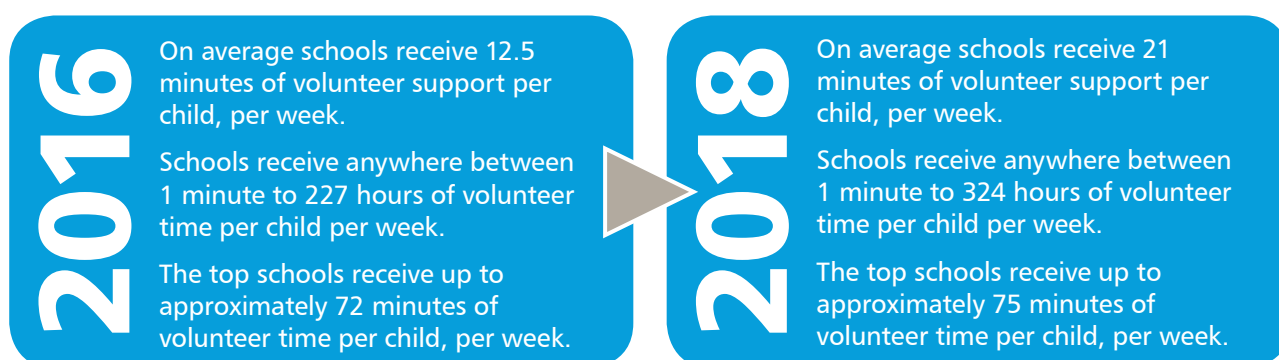
### Schools are raising more money

Likely linked to schools feeling increased pressure to generate voluntary action, the amounts schools are receiving in monetary donations have increased. Comparing the 2013-2014 financial data for the school sample with the financial data for 2016-17, a mere three years later, we see an overall 24% increase in the amount schools are raising per pupil directly through donations to the school, and a 25% increase in the amounts PTAs are raising per pupil per year on the school's behalf. Furthermore, whilst we previously reported that fewer than 10% of schools secured more than £10,000 a year through donations directly to the school (not including PTA income), in our most recent data we now see more than 40% of schools securing more than £10,000 per year through donations direct to the school. This has led to a significant increase in the amount schools are bringing in through fundraising activities and donations per pupil, per year. In 2016, the highest amount we found was £250 per pupil, per year additional income. Now, in 2018 we find schools bringing in as much as £595 per pupil, per year of additional income.



## Schools are receiving more volunteer time

We have seen some significant changes in the reported data on volunteer activities in schools. Excluding the role of Governors in the analysis, which we would expect to remain stable, the data suggests the average amount of time volunteers give, when calculated as per child, per week, has increased from 12.5 minutes, to 21 minutes per pupil, per week. At the top end, some schools receive up to 324 hours of volunteer support a week, which averages to 75 minutes per pupil. Notably, while the average has increased significantly, for schools at the very top there has not been a significant increase from the 2016 data (where 72 minutes per pupil, per week was the highest).



## How are schools achieving this?

This increased activity is being achieved by pro-active and positive strategic efforts by school staff, volunteers and parents. Based on the survey data, 63% of schools state that they increased their strategic focus on engaging and using volunteers over the past year, and 70% claim to have increased the volunteer support their school receives.

However, drawing on the case study interviews, it is important to note the dual role volunteers play within education. On one hand they are being employed and utilised to add enrichment activities to the school's curriculum, on the other they are seen as a cost saving mechanism replacing previously paid support staff, such as teaching assistants and specialist support staff, in the support of children who require additional support.

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*"Volunteers are a massive cost saving for us, we've had to let most of our support staff go, and we've actively replaced them with volunteers – it's not right but it is necessary given the budget constraints we face"*

(Head-teacher)

*"We couldn't keep some of our more vulnerable children in school without the support the volunteers give, we simply don't have the staff"*

(Head-teacher)

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The increase in fundraised income has been driven by many schools taking specific steps to target this, with 70% of the schools claiming that they have successfully increased the fundraised income they receive. To achieve this, we have seen a rise in a number of areas of activity that were previously relatively uncommon. For example, 50% of schools now say they have sought support from local businesses, compared to 31% in 2016, whilst 36% say they now work in partnership with other schools to fundraise and attract volunteers.

# SIGNIFICANT CHANGE 2

## Culture of philanthropy and the 'breakaway schools'

In the previous section we identified the wide scale increase in voluntary action in education, and the extent to which the schools at the top end of voluntary action have increased the volume they generate significantly over the past couple of years. In this section we explore the individual actions by some schools, which means they are able to attract significantly more fundraised income and/or volunteer support than others. There was a significant rise in schools embracing a culture of philanthropy, and successfully significantly increasing voluntary action within their school – what we call the 'breakaway schools'.

### Culture of philanthropy

First and foremost, the most successful schools in attracting volunteer time and fundraised income actively asked people for support. 72% of the schools surveyed directly asked people for financial support, and 46% of the schools actively tried to recruit volunteers. Increasingly schools sought to strategically plan how to draw on skills and opportunities within their school community to help increase voluntary action.

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*"We now have a Governor who we recruited because they are also a CEO of a local charity. It means we have the expertise to really focus on increasing the school's resources"*

(Head-teacher)

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Furthermore, several schools have developed new, innovative responses to increasing voluntary action which were embraced by the school and wider community, and which went above and beyond their traditional activities. For example, one school hosted a mask ball targeting parents, families, alumni and local business support, raising over £18,000 of profit in a single evening; whilst several schools hosted large scale sporting events, such as a charity fun run, charity bike race and even a sponsored sky-dive, each raising over £5,000 for their school community.

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*"We are organising a massive fireworks night involving the whole community but centred around the school. Whilst the organisation and set up costs are big so is the potential reward"*

(Head-teacher)

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The most successful schools at fundraising focussed on simultaneously increasing donations directly to the school and increasing PTA income, ensuring that one source did not 'crowd out' the other. Crowding out occurs when new income from one source leads to a reduction in the income from another source. For example, in some schools where donations directly to the school increased, PTA activity dropped off. Whilst traditional crowding out theory suggests this is due to donors not wanting to support a cause they feel is supported elsewhere, a more recent study<sup>7</sup> identified this often occurs when charities or causes self-select to reduce their fundraising efforts because of new income success. This self-selection version of crowding out appears to occur in some schools, with the PTA being left solely responsible for fundraising activities for the school, and the school itself doing less to attract donations or time.

In contrast, the schools which had a 'culture of philanthropy' – with a positive approach to fundraising and volunteer support embedded through the school community – and which shared responsibility for fundraising and volunteer recruitment among all staff and volunteers achieved more fundraising success. This requires a close working relationship between the school management committee and the PTA to ensure maximum results.

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<sup>7</sup> Andreoni, J., & Payneis, A. (2011) 'Is crowding out due entirely to fundraising? Evidence from a panel of charities'. Journal of Public Economics, vol 95, pp.334-343.



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*"We've worked hard to align the PTA and governing body to maximise opportunities, sometimes it is better the PTA as a charity pursues an opportunity, whilst at other points in it best done by the school – we decide together"*

(Head-teacher)

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## Social enterprise activities

Schools are increasingly seeking to maximise income generation from their facilities. Most commonly this was achieved through renting out their spaces to community groups and for private functions. However, some schools sought to maximise their income through other sources. For example, one case study school made significant profit facilitating three 'extended school' clubs, renting out the computer suite for adult training and facilitating training programmes for other schools to buy places on. Another school ran a series of sport clubs outside of the school term which generated over £20,000 worth of profit to be re-invested in the general school budget.

## The 'breakaway schools'

There is an increasingly disproportionate amount of total fundraised income which is harnessed by the top 10% of fundraising primary schools, and particularly by the top 1%. Put simply, the gap between what fundraised income schools are securing is increasing, with the top schools sprinting ahead, and leaving the majority trailing in their wake – they are 'breaking away' from the rest. All of the breakaway schools are situated in areas which are within the top 30% of wealthiest areas in England (based on the Index of Multiple Deprivation).

Whilst the average school, taking into account both funds donated directly to schools and PTA income, fundraised approximately £19,883 in 2016-17 equating to £94 per pupil, in terms of distribution less than a third of the schools made this or above. A large proportion of fundraised income is concentrated in a few schools: the top 10% accounted for 25% of all the donated income, and the top 1% of schools account for 10% of all the donated income. If we translate this into figures, in 2016-17 the top 1% of the schools by fundraised income per pupil collectively raised £476,784. This compares to a total of fundraised income of £875 for the bottom 1%. In terms of the amount raised per pupil, this means the top 1% of fundraising schools bring in £563 of additional income per child through donations, versus the bottom 1% who secure £0.33 per child, per year of additional income.

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*"We have really focused on increasing the activity of the PTA, they now attend Governors' meetings and update regularly and work with the Governors to support fundraising"*

(Chair of Governors)

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## What sets these schools apart?

Whilst they are situated in the top third of the wealthiest areas in the local authority considered, this on its own does not guarantee fundraising success. Based on survey data, interviews and exploration of the publicly available information, we observe that these schools identify voluntary action as a mechanism to differentiate their school from others in a competitive marketplace (where parents selectively choose where to send their children). These schools see voluntary action as a way of gaining an edge over the competitors.

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*"Voluntary action is about making our school stand out to prospective parents"*

(Head-teacher)

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To achieve this success, these schools adopt a variety of strategically focused initiatives and most commonly have individuals dedicated to the roles of fundraising and volunteer engagement and support. Activities include a combination of pro-active volunteer engagement, high profile events ran by the PTA, income generating 'social enterprise' type activities, collaborative arrangement with private schools and businesses, alongside regular applications to charitable trusts and grant making bodies. Interestingly to note, schools attracting significant amounts of voluntary action appear to accept the potential inequalities this brings, arguing that voluntary action is a way for schools in wealthier areas to 'balance out pupil premium advantage' (Head-teacher).

However, this argument is undermined by the evidence. Schools in wealthier areas by no means had a monopoly on seeking to engage more voluntary action, nor did they have a monopoly on using a wide range of activities to do so. Rather, we found that while efforts to increase voluntary action were relatively evenly spread across schools regardless of the relative wealth of the area they are in, schools in wealthier areas were rewarded with greater fundraising and volunteer recruitment success than schools in areas of disadvantage.

# SIGNIFICANT CHANGE 3

## The gaps are widening

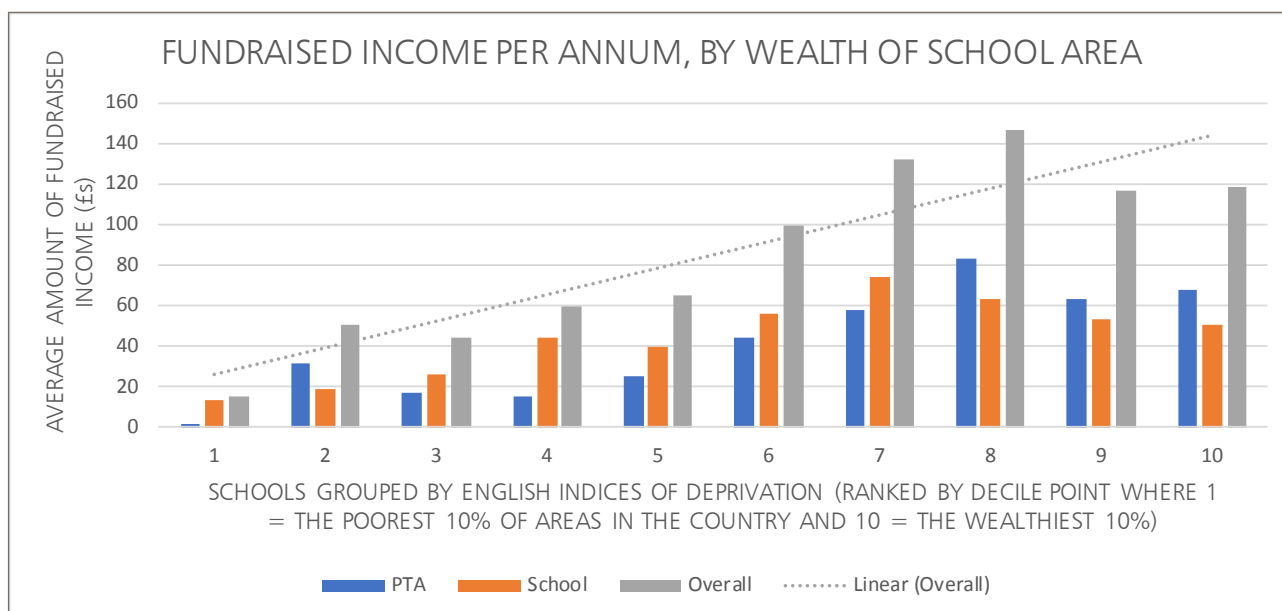
Whilst voluntary action in primary education is on the rise, with this we also witness increasing inequalities in the distribution of fundraised income and volunteer support.

### Fundraising in primary schools

Unsurprisingly, schools with an active PTA raised more funds than those without. 94% of schools had a PTA or similar friends association set up to raise funds and support the school. For 6% of schools, all falling within the lowest 10% of schools by fundraising income per pupil, we could find no evidence of a PTA or equivalent friends association. For 22% of schools, we found evidence of friends associations which were either constituted as a community group or, more commonly, sat under the umbrella of the school. This leaves the majority, 72% of the schools, having a PTA registered as a charity with The Charity Commission.

Of the PTAs which were registered charities, income for 2016-17 ranged from £1 to £115,368 equating to between £0 and £313 per pupil. This is a significant difference in potential income even before consideration of donations directly to schools. Direct school donations ranged from £0 to £138,000 in 2016-2017, equating to as much as £471 per pupil. When we compare this to the data collected in the initial research, which only looked at donations directly to schools, the highest amount of income per pupil we saw was £248 (based on 2013-14 financial data), therefore this represents a 90% increase in the top end of fundraised income. If we then consider the PTA income and direct school donations, this means the top end of schools benefitted from over £170,000 of fundraised income in total equating to £594 per pupil (an 11% increase in the schools' budget), again compared to £0 in other schools.

We can calculate schools donated income against the index of multiple deprivation decile data, as a proxy indicator of the socio-economic situation. Deciles are calculated by ranking 32,844 neighbourhoods in England from most deprived to least deprived and dividing them into 10 equal groups. These range from the most deprived 10 per cent of neighbourhoods nationally (decile 1) to the least deprived 10 per cent (decile 10) of neighbourhoods nationally.



Three important factors emerge from this data. Firstly, the trend line demonstrates a link between an area's wealth, and the total amount of fundraised income schools receive. Second, for schools within areas considered to be more deprived, fundraising income is generally dominated by donations directly to the schools, whereas for schools in wealthier areas PTA income plays a more equal, or even larger, role.



Third, whilst there is a link between area wealth and overall fundraised income achieved by a school, this does not fully account for widening gaps in fundraised income by schools.

*“Fundraising is a necessity if we want to provide any extras and we rely on volunteer support for children with additional needs”*

(Head-teacher)

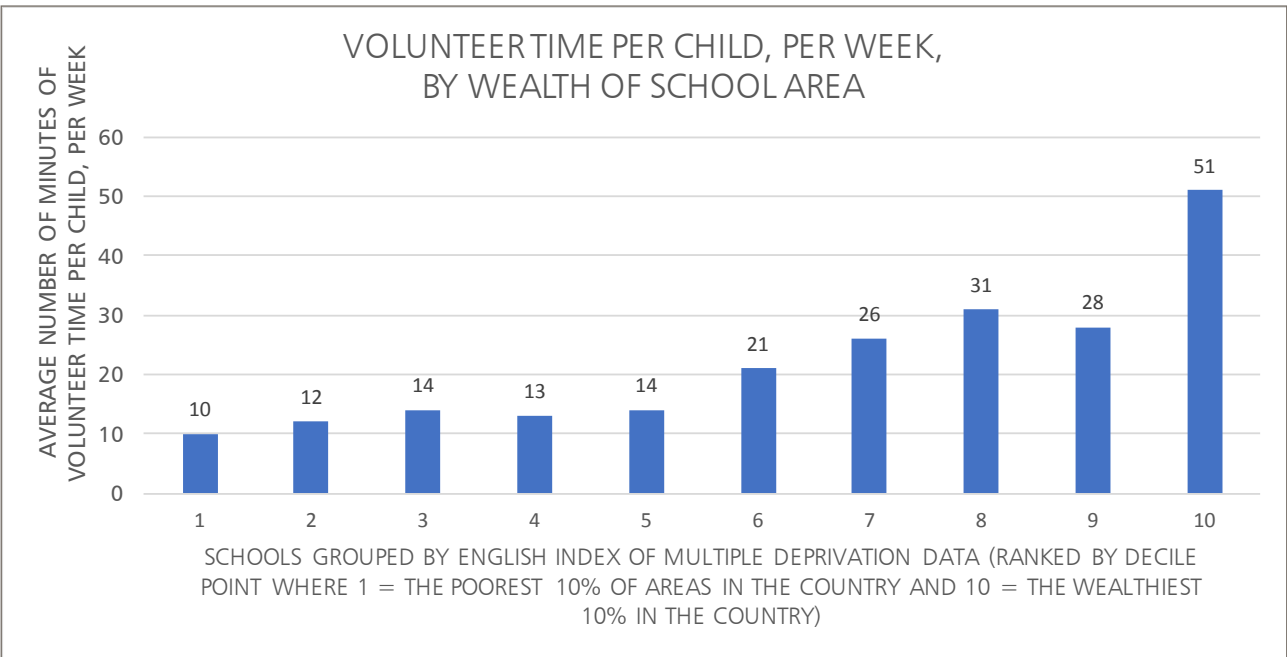
*“Volunteers are crucial to the running of the school. They allow staff to concentrate on the core teaching whilst volunteers assist those that need additional support”*

(Head-teacher)

## Volunteers in primary schools

Within the survey data we asked schools to consider the number of volunteers they have who regularly support the school and how much time these volunteers gave to the school per week. As this is self-reported data, we acknowledge the data is based on the ‘average’ week, and that no two weeks are the same, therefore we consider these figures as estimates rather than exact figures. However, based on the survey data, we have seen a significant overall rise in the amount of volunteer time dedicated to schools, increasing from an average of 12.5 minutes per child in 2016, to 21 minutes per child, per week.

As with donations of money, volunteer time is not evenly distributed. Again using indices of multiple deprivation, we can observe a clear relationship between how deprived an area a school is in and how much volunteer time it receives. The differences are stark. In the poorest 10% of areas, schools receive just 10 minutes of volunteer time per pupil per week, compared to 51 minutes in the wealthiest 10% of areas. Indeed, in the poorer half of areas, the average number of minutes is less than half of what it is in the wealthier half.



Interviews with schools revealed a second area of inequality in volunteering, in terms of the skills volunteers could offer. Schools highlighted differences in the skills that their pool of volunteers could bring. For example, a case study school situated in a wealthy area was achieving significant cost savings by reducing support staff time and replacing this with volunteers who were established child support professionals. On the other hand, a case study school in an area of significant deprivation highlighted how they struggled to get parents to engage in the school more generally, and a high proportion of their parents did not speak fluent English. Therefore, their ‘friends association’ focused solely on engaging parents in the school community, and volunteering and fundraising was viewed as ‘a step too far’ (Head-teacher).

*“We are finding it increasingly hard to attract volunteers for fundraising activities especially from families that would have run PTA groups”*

(Head-teacher)

# SIGNIFICANT CHANGE 4

## Necessity, rather than choice

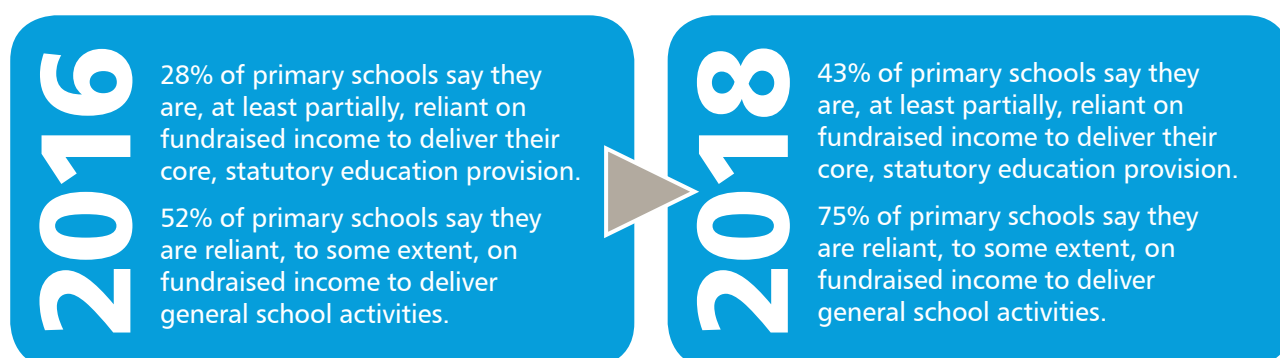
Our last significant area of change is to do with how schools viewed the role of voluntary action in education. Our 2016 data highlighted that schools viewed the more 'traditional' types of voluntary action, for example school fairs, funding of extra-curricular activities and volunteer readers, as positive for the wider school community and good for parental engagement. The growing pressure to pursue fundraising and volunteer support beyond these traditional mechanisms was viewed less favourably. Broadly schools fell into four over-arching categories, viewing voluntary action as either a mechanism for survival, a nicety to enhance the school community, a positive ideological choice in terms of increasing competition to enhance education quality, and finally as a direct challenge to ideological norms and a set of activities the school should not be engaging with<sup>8</sup>. Generally speaking there was a relatively even split of schools between each of these approaches.

### It's about survival

Based on the survey data and interviews, we found a significant shift in views in relation to voluntary action. Whilst many schools still raised ideological challenges relating to engaging in voluntary action, nearly all schools now identified voluntary action as a mechanism with which to respond to budgetary challenges. Whilst this has resulted in increases in voluntary action in education as highlighted in our first findings, some worrying factors emerge. Most concerning, the percentage of schools who now say that they are at least partly reliant on voluntary action to deliver core, statutory education provision has increased from 28% to 43% between 2016 and 2018, whilst 75% schools now claim they are reliant on fundraised income to deliver general school activities, compared to 52% two years previously.

The increasing reliance on voluntary action to deliver both core and additional school activities is extremely concerning and indicates a troubling trend in school funding. Whilst the introduction of a new National Funding Formula offered hope for a more equitable funding arrangement, most schools in England will not benefit from the new funding formula. Indeed, the independent Institute for Fiscal Studies has suggested that, in real terms, per pupil funding will decrease by 6.5% by 2019. While the National Funding Formula does seek to provide additional income for schools in areas of deprivation or facing challenging circumstances, there was shared acknowledgment across the surveyed and interviewed primary schools that they are simply not given enough money to fund adequate levels of staffing, support and basic equipment.

As a result, schools increasingly adopt a 'survival' approach to voluntary action, as the concept of remaining ideologically opposed to engaging in these activities becomes untenable, and schools are forced to engage with voluntary action, as one of the mechanisms to potentially counter budget challenges.



<sup>8</sup> These framings are further expanded in Body, A., Holman, K. and Hogg, E. (2017) 'To bridge the gap? Voluntary action in primary schools'. Voluntary Sector Review, 8(3), pp.251-271.

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*"Fundraising and attracting volunteers is now an essential part of school management"*

(Head-teacher)

*"Voluntary action itself is good practice but has always been for extra-curricular and special projects. The concern is that we are now having to raise money for basic necessities due to cuts"*

(Chair of Governors)

*"This is being done out of necessity as there are insufficient funds – whilst it is good to get community involved to take responsibility / onus on children's education, not all are willing to help and a lot of the funds that we are having to raise should have been funded by the government for the future of the children"* (Head-teacher)

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## Engaging specialists

In the 2016 research, few schools reported specifically tasking an individual with fundraising and/or volunteer engagement and management. In 2018, we see an increasing number of schools specifically employing individuals tasked with these very functions.

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*"We have just appointed a school secretary, part of whose role is to fundraise externally and focus on volunteer support"* (Head-teacher)

*"A designated teacher is now looking into funding opportunities in the local community e.g. Tesco's"* (Head-teacher)

*"We employed a new secretary who is also responsible for looking for funding opportunities for us"* (Chair of Governors)

*"A Governor is now designated to take lead responsibility for fundraising"* (Head-teacher)

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Whilst 56% of the schools surveyed stated there was a clear responsibility for fundraising within their school, and 58% stated there was a single person responsible for volunteer management, just under one third of schools are turning to consultancy and external support to increase income within their school. Keeping things in house seems, for now at least, to be by far the most common approach.

## Increasing tensions

As the pressure on budgets increases, there are growing tensions between what schools felt voluntary action should achieve versus what it has to be used for. Interviews with Head-teachers revealed growing concerns about the 'unsustainable reliance on volunteers' (Head-teacher). In addition, a number of the case studies discussed the increasing issues experienced between the PTA and school, as schools ask PTAs to fund basic core costs rather than the more traditional enrichment activities. Furthermore, individuals interviewed commonly expressed anger at greater proportions of their time being dedicated to raising additional funds, rather than focusing more directly on the education of children.

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*"Voluntary action is a necessity to bridge the gap and the decreasing funding we are receiving..... But is this something we really want our schools to be focusing on? Surely they should be focused on the education and development of our children. Our backs are against the wall – it looks like we will increasingly have to do this, but it is not a teacher's core skillset and arguably it shouldn't have to be"* (Head-teacher)

*"Previously it was needed for the 'extras' but this year we used PTFA funds to buy reading books"* (Head-teacher)

*"Voluntary action in school generally enhances what we are able to offer. It used to be 'the icing on the cake' but now it is sometimes used for more core activities as well"* (Chair of Governors)

*"I am very angry that this is the focus of schools, to keep heads above water and not on providing excellent education"* (Head-teacher)

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# IS THIS A BRIDGE TOO FAR?

In our 2016 report *To bridge the gap? Voluntary action in primary education* we concluded that schools are increasingly turning towards alternative sources for funding and support, to deliver high quality education. However, we highlighted significant disparities in the dispersal of those resources. As a result, we recommended a reconsideration of the role of voluntary action in primary education, due to the risk of it further increasing social inequalities. What we now note in this updated report is a significant increase in voluntary action in primary education and whilst we witness some innovative approaches to increasing voluntary action, as we previously predicted, we also see increasing inequality.

Nonetheless, we should not blame or criticise any individual school for taking forward this action. Schools are facing increasingly difficult financial circumstances, with reduced budgets coupled with ever increasing costs. As a result, schools are taking drastic action with far reaching consequences, reducing staffing, increasing class sizes, severely reducing pastoral and mental health support and even cutting down the length of time they are open or the number of days they open for. They simply cannot manage on the financial resources they are currently allocated, without making some difficult decisions.

Much of the analysis in this report suggests some schools are well equipped to rise to the challenge of bolstering their income through attracting additional funding and volunteer support. However, so long as the responsibility for narrowing the social inequalities is placed on the shoulders of our local schools, we should not allow a narrative to develop which suggests that all schools can achieve this equally. Despite their best efforts, some schools start from a position of significant disadvantage with the pool of their potential resources being drastically smaller than those schools in wealthier areas. Returns do not always reflect the effort or ideas that have gone in, and some schools are simply left working hard to extract resources from communities with less to give. Inevitably, they generate less than their wealthier counterparts even with similar attempts to generate as much as possible.

We also wish to highlight some of our significant concerns revealed from this data:

- 43% of schools, an increase from 28% two years ago, claim they are dependent to some extent on voluntary action to deliver their core, statutory education services. This is unsustainable and schools need to be funded properly to deliver their core statutory duties.
- We found multiple examples of schools reducing specialist support staff, and transferring these responsibilities to volunteers. This is unsustainable and is likely to negatively impact on the most vulnerable children in our society.

Whilst charity can and does provide amazing opportunities for schools, it suffers because it is particular, haphazard and unaccountable. This makes it perfect as an additional provision, however it makes it dangerous as a core part of schools funding. If the state and the population as a whole have decided that educating children is important – and surely we have – then the education of **all** children is important. A system which underfunds education and hopes that charity will pick up the slack runs the very real risk of exacerbating inequality.

Therefore, we argue that within primary education, voluntary action benefits the wealthiest more than it benefits the less well off – voluntary action can accomplish good things but relying on it in any way to deliver what we consider a fundamental human right in our society is hugely problematic.

# WHAT MAKES SCHOOLS STAND OUT?

Schools at the top end of the voluntary action scale demonstrated a pro-active approach to voluntary action, embracing a culture of philanthropy, as well as being based in wealthier areas. Simply put, while the socio-economic context is important, fundraising and engagement of volunteers does not occur without a concerted effort. Summarising research<sup>9</sup> on this topic and drawing on the evidence presented in this report, we highlight here the distinctive characteristics schools, working in all areas, can take forwards to achieve voluntary action success.

## SCHOOLS MUST ADOPT A PRO-ACTIVE APPROACH:

For schools to achieve success they need to pro-actively engage in fundraising and volunteer management: this means having strategic and operational commitment across the school. We see this as being achieved in four ways. Firstly, as almost all donations and commitments to volunteer occur as a response to **someone being asked**, for schools to achieve increased voluntary action they must proactively ask donors and volunteers for support<sup>10</sup>. Secondly, schools should **be specific** in this ask: facilitating donors and volunteers to donate their money and time to specific projects, schools are likely to attract increased amounts of voluntary action. Thirdly, though fundraising and volunteer recruitment may be centrally coordinated by one or few individuals, it should not be the sole responsibility of that one individual within school or the PTA. Instead fundraising and volunteer management should be a **collective response** supported by the whole school. Finally, for schools to maximise their fundraised income and volunteer engagement they need to **maximise existing opportunities**, as well as seek new ones. In doing so schools can look to explore a range of fundraising approaches (i.e. individual donors, events, charitable trusts, corporate partners, etc.) and tailor the ways they ask for donations of time and money to suit the school and local community needs.

**CREATING A PHILANTHROPIC NARRATIVE:** Closely tied to taking a pro-active approach to voluntary action, creating a positive narrative for why schools should engage in this activity is necessary in terms of attracting funds and volunteers. This is important both internally to the school and externally with partners. Internally, schools need to celebrate and acknowledge their fundraising and volunteer successes. Highlighting these successes supports the development of a culture of philanthropy across the school. Rather than frame their story in the context of depleting budgets, schools can think additional funding is used to go above and beyond statutory funding obligations.

**INVESTING IN PEOPLE AND SKILLS:** Though schools wish to increase their fundraised income and volunteer support, they feel inhibited to fully pursue this due to a lack of time, skills and knowledge. Therefore, successful fundraising and volunteer recruitment attempts tended to be grown out of existing opportunities from within the current structure of the school, generally as an 'add-on' to an individual's existing role. To maximise these opportunities and identify additional opportunities, schools need to consider how to equip individuals tasked with fundraising and volunteer management with the appropriate time, skills and knowledge, alongside supporting a wider understanding of fundraising and volunteer management across the school to ensure that the role of voluntary action is understood and that expectations remain realistic.

**IDENTIFYING DUAL BENEFITS:** As identified, schools are better placed to secure increased fundraising income and volunteer time when the school is at the heart of the community, and voluntary action is able to have a 'dual benefit', meeting both educational and community needs. Cuts to public and voluntary sector providers are placing increased pressure on schools as wider community support for children and young people diminishes. This research highlights how schools fundraising and volunteer engagement efforts have often been used to readdress these issues, for example providing early intervention and emotional wellbeing support, resulting in schools occupying positions both in education and social welfare provision. This dual benefit, if clearly articulated, can encourage donors and volunteers to give more.

9 Summary edited from Body, A. (2017) 'Fundraising for primary schools in England: Moving beyond the school gates'. International Journal of Nonprofit and Voluntary Sector Marketing, 22(4), e1582.

10 Wiepking, P., & Maas, I. (2009) 'Resources that make you generous: Effects of social and human resources on charitable giving'. Social Forces, 87(4), pp.1973-1995.

# CONCLUSION

There is a huge amount to celebrate about the role that voluntary action plays in primary education. Across a wide range of areas and contexts there are schools who are working tirelessly on innovative approaches to attract donations, and recruit and support volunteers. The increases in donations of money (the overall average up from £41 per pupil, per year in 2016 to £51 in 2018) and of time (up from 12.5 minutes per pupil, per week in 2016 to 21 minutes per pupil, per week in 2018) are the result of committed and strategic efforts by schools to increase the resources available to them. However, while recognising the success these increases represent, we have concerns about the effect they are having on social justice in education.

Firstly, while we must not forget the ingenuity and dedication that has gone into securing this growth in voluntary action, we must also not forget that an increasingly important driver of this focus is the decline in school budgets over the past few years. This is illustrated by the growth in the proportion of schools who feel under pressure to increase donated income growing between 2016 and 2018, with nearly all schools (94%) feeling pressured to increase donations in 2018 compared to two-thirds (66%) in 2016. This pressure is leading to fundraising playing an increasing core role in school funding, with 60% of schools in 2018 saying that fundraising is a core strategic focus of their school, over twice as many as in 2016. Schools are seeing fundraising in particular as a necessary response to declining budgets and while for some schools this may be an effective substitute, this raises both moral questions about whose responsibility education funding is and social justice concerns about how to ensure a level playing field for all children.

Secondly, the bifurcation of schools between those who can access donors and volunteers with significant resources (in terms of money, skills, experience and so on) and those who cannot is concerning. For fundraised income in particular we have seen a significant growth at the top end between 2016 and 2018, while the main group of schools have stayed relatively stable in terms of the amount they raise. At the top end, we now find schools bringing in almost £600 per child per year, more than double the highest we found in 2016. This increase at the top end goes a long way to accounting for the more modest increase in the overall average, from £41 in 2016 to £51 in 2018. While for the majority of schools fundraised income plays only a small role in school funding – an additional 2.04% of budget on average – for the breakaway schools it can play a significant role, adding as much as 11% additional budget.

If this trend continues – and there is nothing indicating otherwise – we could be sleepwalking into a situation where some schools, likely in wealthier areas, will have budgets heavily supplemented by voluntary income while other schools, likely in poorer areas, continue to struggle along with only a small fundraised addition to their statutory income. Further freezes or cuts to education budgets will only exacerbate this trend.

Thirdly, the pressure to fundraise and attract volunteers in order to provide core and additional activities is causing schools to look to sources which have traditionally funded voluntary sector organisations for their funding. As we identified in our 2016 report, cuts to school budgets have been alongside to cuts to other social welfare provision from which schools benefit. As a result, schools are increasingly seeking fundraised income and volunteer support to meet the wider needs of their pupils. One approach that schools have taken in this is to partner with local voluntary organisations to bid for funding from trusts and foundations to gain social welfare support for their pupils and their families. In this respect, we find schools are increasingly behaving like charities, particularly in more deprived areas. While this provides a potential way for schools in less wealthy areas to attract additional funding, it also makes more complex their role, rather than contributing directly to their core educational aims.

These concerns do not by any means imply we are opponents of voluntary action in education. In raising these criticisms, we do not want to throw the baby out with the bathwater – donations of time and money make huge contributions to the work that schools do and the experiences that pupils receive. We should both celebrate this and learn from successful schools. However, we should also be on our guard, wary of privatisation through the back door resulting from an ever-increasing reliance on private support for a public good.



**Dr Ali Body**

Faculty Director (Early Childhood) & Senior Lecturer  
School of Childhood and Education Sciences  
Canterbury Christ Church University  
[ali.body@canterbury.ac.uk](mailto:ali.body@canterbury.ac.uk) | [www.canterbury.ac.uk](http://www.canterbury.ac.uk)