HIDDEN ASSET 2009

RAISE

Regional Action and Involvement South East

RAISE Hidden Asset 2009

Surrey

November 2009

Acknowledgements

Thank you to South East England Development Agency (SEEDA) for funding this survey and report.

We want to give a special thank you to those organisations and individuals who participated in the survey. The value delivered by those organisations taking the time to complete the questionnaire has proven invaluable to us capturing such a definitive snapshot of the third sector in the South East.

We want to thank those infrastructure organisations who cascaded and helped promote the importance of participation in this exercise.

We wish to extend our thanks to the Charity Commission for supplying baseline data used in validating the survey findings.

Researched and written by:

www.yorkconsulting.co.uk

RAISE
Bridge House, 1 Walnut Tree Close
Guildford, Surrey
GU1 4UA
mail@raise-networks.org.uk
Tel: 01483 885266

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1 INTRODUCTION

1.1 RAISE (Regional Action and Involvement South East) commissioned York Consulting to undertake research into the voluntary and community sector (VCS) across the South East. This involved updating the Hidden Asset survey and analysing the Charity Commission's database and other published sources of information.

1.2 The Hidden Asset research plays an important role in defining the sector and its needs to support future development, at the regional level. In particular, it provides an economic input into the Regional Economic Strategy (RES) developed by SEEDA and it supports sub-regional understanding of the sector.

1.3 This report focuses on Surrey, together with six other local area reports covering:

- Berkshire;
- Buckinghamshire;
- Hampshire;
- Kent;
- Oxfordshire;
- Sussex.

1.4 The aim of this report is to provide local level detail and not to repeat material used in the main regional report. Therefore, the following is provided:

- commentary on key data;
- use of graphs and tables to highlight differences;
- complete tables of valid data (in an associated spreadsheet with numbers and percentages, comparing local data with regional data).

Methodology

1.5 The primary element of the methodology was a survey of voluntary and community organisations across the South East. In addition we reviewed national and regional literature to identify comparator data and analysed data supplied by the Charity Commission.

Questionnaire Design

1.6 The questionnaire was largely based on the previous questionnaire used in 2005 to facilitate comparison between the two surveys. Some changes were made to bring questions into line with contemporary language and categorisations. The questionnaire was piloted among five member organisations and feedback used to make minor modifications.

1.7 The questionnaire was designed to be self completed in hard copy or in electronic format as an Excel spreadsheet file.

Questionnaire Distribution

1.8 A combination approach was taken to questionnaire distribution involving:

- emails with a link to the questionnaire sent to all RAISE members with a valid email address;
- hard copy questionnaire posted to all RAISE members with no email address;
- emails with a link to the questionnaire sent by county-based representative bodies to all their local organisations;
- an invitation to participate in the RAISE newsletter with a link to the RAISE website;
- an invitation on the RAISE website to complete a questionnaire from the RAISE website.

Data Collection

1.9 The process of data collection took place between May 2009 and July 2009. The following activities were undertaken to boost the response rate:

- where contact details were held a reminder email was sent to organisations;
- follow-up telephone calls were made to facilitate the completion of questionnaires.

1.10 A total of 628 valid questionnaires were received, compared with the 549 responses received in 2005.

Analysis of Responses

1.11 Responses by geographic area represent relatively small samples (Figure 1.1). This limits the depth of reliable analysis; most data is not statistically significant at local level (see Appendix A). Therefore where differences are significant they are explicitly labelled as such, other differences are presented for indicative purposes.

Figure 1.1: Survey responses and Charity Commission data

Geography	2009 Survey		Charity Commission
	N	%	%
Berkshire	85	14	17
Buckinghamshire	44	7	9
Hampshire	113	18	17
Kent	65	10	18
Oxfordshire	96	15	9
Regional	8	1	–
Surrey	87	14	14
Sussex	130	21	16
Total	628	100	100

1.12 Of the 628 valid questionnaires received a small number were for large regional or national organisations which gave no indication of their geographical base.

1.13 The lack of the original dataset means we do not know the exact method for weighting used. Therefore, we have not weighted the data for general analysis but have used responses to estimate total numbers of employees and volunteers linked to national estimates. Furthermore, we have no local level breakdown from 2005 data.

1.14 As in the previous study the data may be skewed towards larger voluntary or community organisations that were more able to spend time completing the questionnaire.

Acknowledgements

1.15 We are grateful to all voluntary and community organisations that participated in this research and hope that the results contained within this report are help and insightful.

1.16 Thanks also go to the RAISE staff and RAISE Board Members who helped to distribute and collate the questionnaires.

2 SURREY VOLUNTARY AND COMMUNITY SECTOR

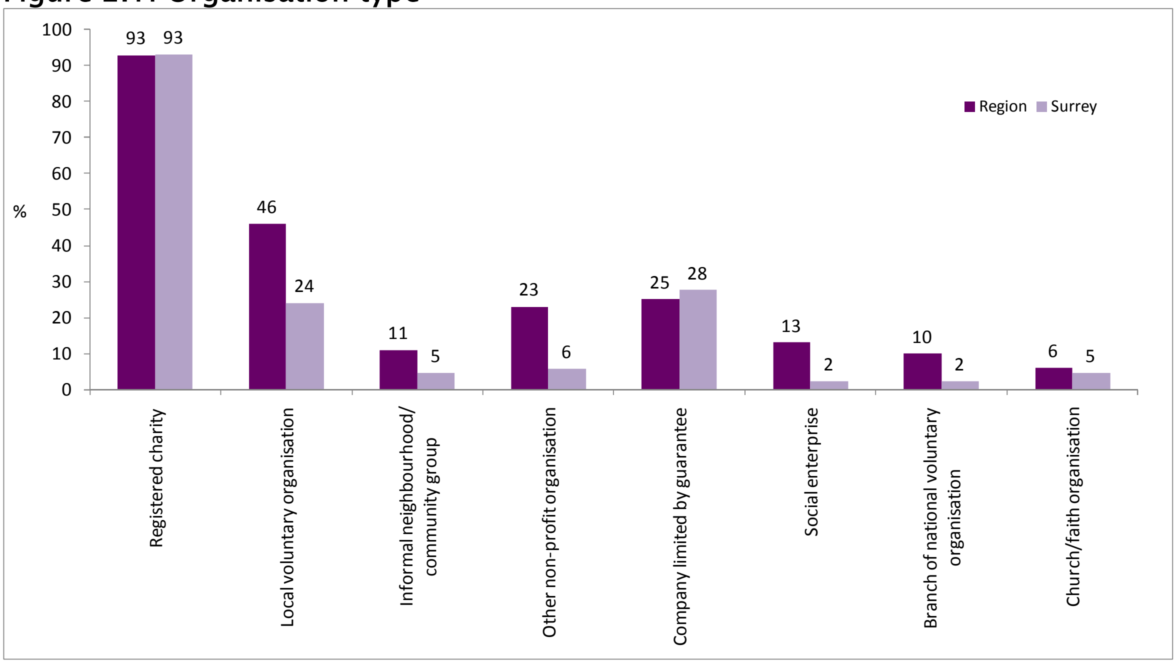
Structure of the sector

2.1 The proportion of respondents from Surrey (14%) is in line with that indicated by Charity Commission data (14%). A total of 87 organisations responded from Surrey.

2.2 The total number of voluntary and community organisations in Surrey estimated by the Hidden Asset research is 5,796. Total paid employment in the sector is estimated at 42,400 together with around 91,990 volunteers.

2.3 The majority of organisations who responded to the survey are registered charities (93%); in line with regional patterns (Figure 2.1). There are lower proportions of local voluntary organisations (24% compared with 46%), other non-profit organisations (6% compared with 23%) and social enterprises (2% compared with 13%) than across the region.

Figure 2.1: Organisation type



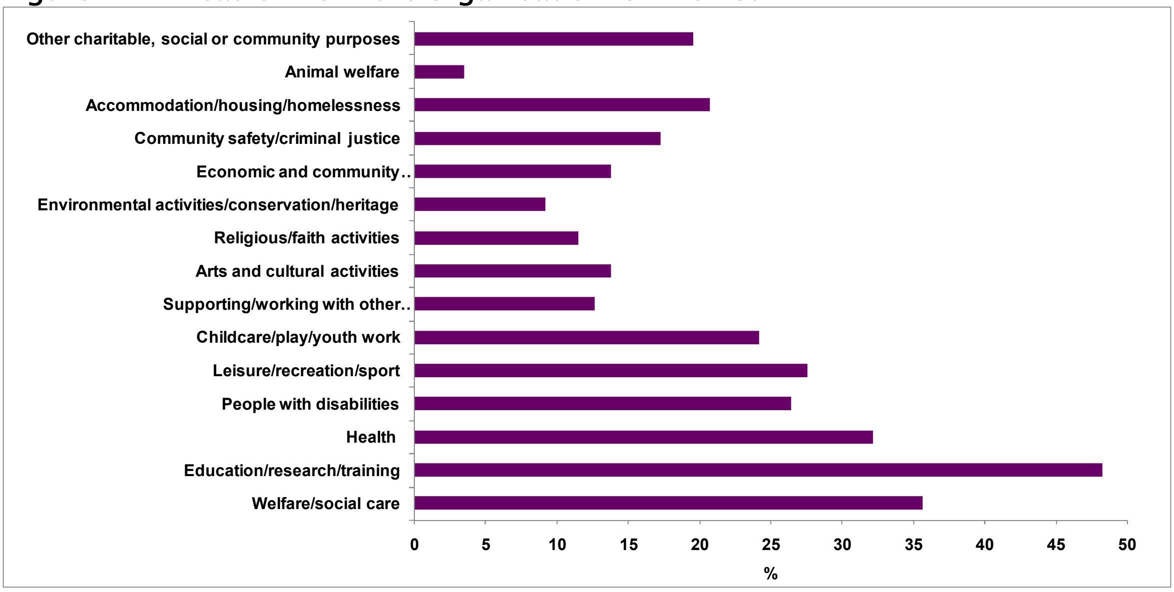
Note: multi-response, base=87

Areas of work

2.4 Education, research and training is the most common specific area of work (48%) (Figure 2.2). Many respondents (20%) described more specific areas of work which are grouped under 'other charitable social and community purposes'.

2.5 The next major area of work is Welfare and social care (36%) followed by Health (32%), Leisure, recreation and sport (28%) and People with disabilities (26%).

Figure 2.2: Areas of work the organisation is involved in



Note: multi-response, base=87

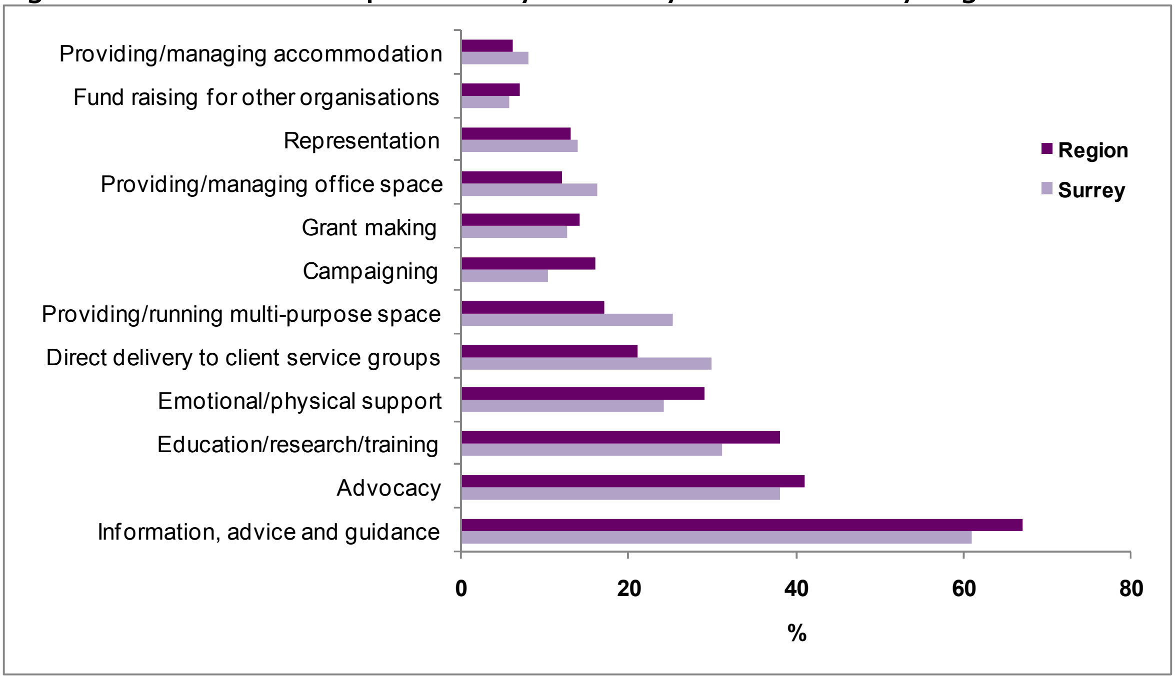
2.6 There are small but not significant differences compared with the regional data.

Main services provided

2.7 Similar to findings in regional data, Information, advice and guidance is the most commonly provided service (61%) by voluntary and community organisations (Figure 2.3).

2.8 The next three major groups include Advocacy (38%), Education/research/training opportunities (31%), and Direct delivery to client service groups (30%). These were also among the most common main activities in the regional research, highlighting their importance.

Figure 2.3: Main services provided by Voluntary and Community Organisations

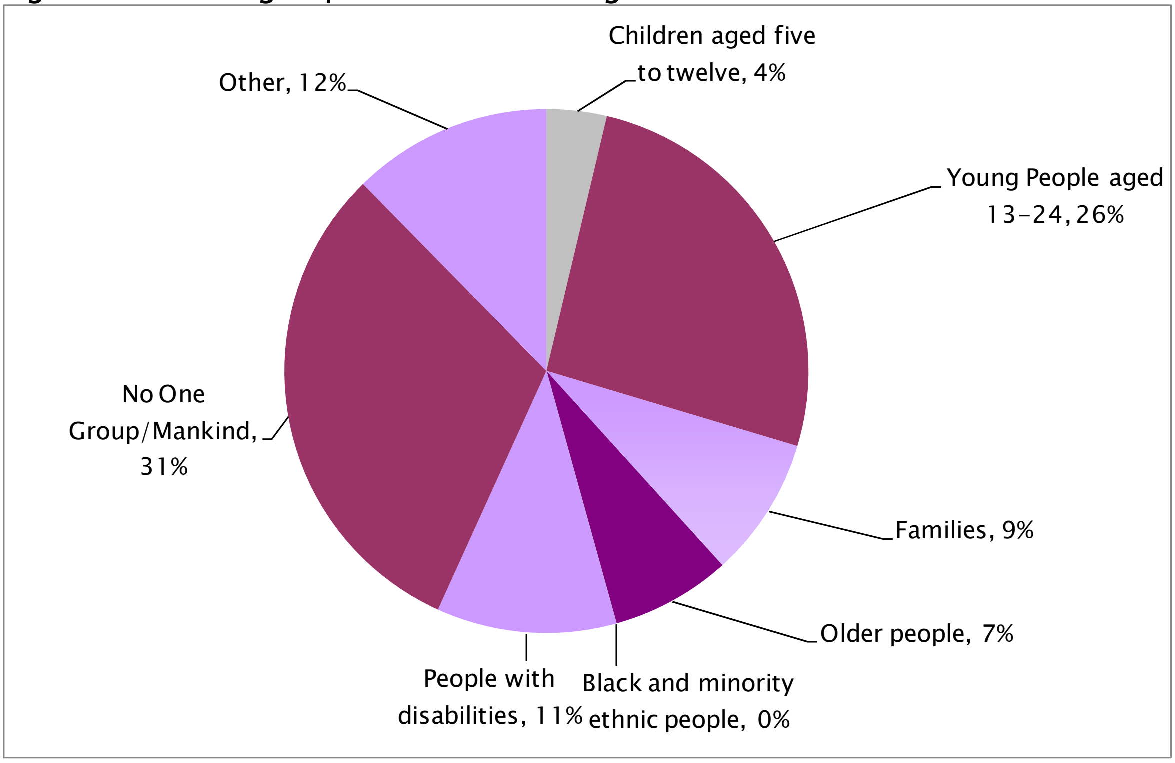


Note: multi-response, base=628/87

Client groups

2.9 In terms of client groups (Figure 2.4), many organisations describe very specific ‘other’ niche groups (12% compared with 20% regionally) or say their clients belong to no one group or mankind in general (31% compared with 29% regionally). Of those that were able to be more specific around one in four say that Young people aged 13-24 are their main client group (26% higher than the region level 15%), followed by People with disabilities (11% in line with the regional level).

Figure 2.4: Client groups which use the organisations services most



Note: single choice question, base=87

2.10 The unique nature of all voluntary and community organisations means that summarising their focus of activity into such broad groups loses some of the rich tapestry of their diversity. Hence many organisations find it difficult to summarise specific groups that they work with.

Employees and volunteers

2.11 Total paid employment across the sector is calculated at 42,400 individuals (Figure 2.5). The majority of paid employment[1] (66%) is part time. Across the region employment in the sector has been static between 2005 and 2009. In reality it may have risen and then fallen away with the onset of recession. A recent survey of RAISE members identified that 12% of organisations have made redundancies.[2]

Figure 2.5: Paid employees and volunteers

	Paid employees	*Volunteers*
Occasional	10,410	31,320
Part-time	21,000	58,740
Full-time	10,990	1,930
Total paid staff	**42,400**	**91,990**

Note: Totals may not sum due to rounding

2.12 Total volunteers are estimated at 91,990; similarly to paid staff the majority are part time.

2.13 We estimate that 71% of the workforce is female (Figure 2.6). This is in line with other estimates for the sector, for example Brighton and Hove Community and Voluntary Sector Forum calculated that 68% of those working in the sector were female.

Figure 2.6: Paid employees and volunteers by gender

	Male	*Female*	*Total*
Employees	12,410	29,990	42,400
Volunteers	26,920	65,070	91,990
Total	**39,330**	**95,060**	**134,390**
Percentage	29%	71%	100%

Note: Totals may not sum due to rounding

[1] Considering part-time as a proportion of part-time and full-time

[2] Economic Downturn Survey, RAISE, April 2009

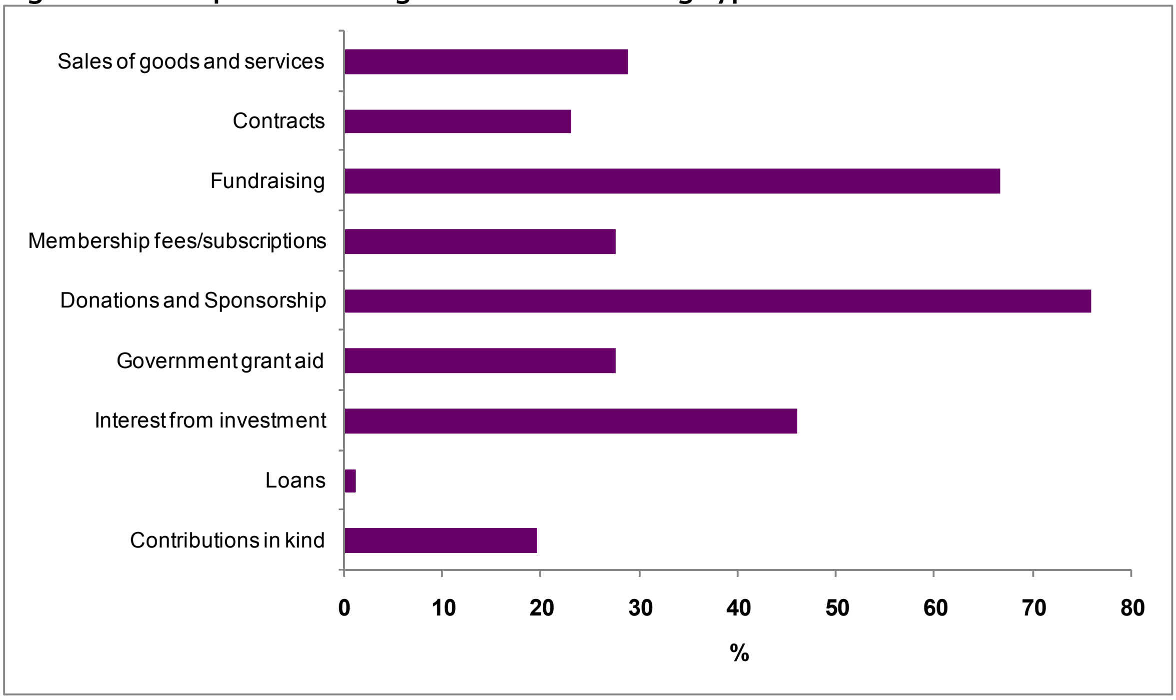
2.14 Surrey has the third lowest number of employees and volunteers across all the sub-regions.

Income

2.15 The key types of income are Donations and sponsorship (received by 76% of organisations), Fundraising (67%) and Interest from investment (46%) (Figure 2.7). Contracts (23%) and Contributions in kind (20%) are received by fewer organisations.

2.16 Loans are very infrequently used, indicating the relative solvency of the sector but also probably the reluctance of financial institutions to lend.

Figure 2.7: Proportion of organisations receiving types of income



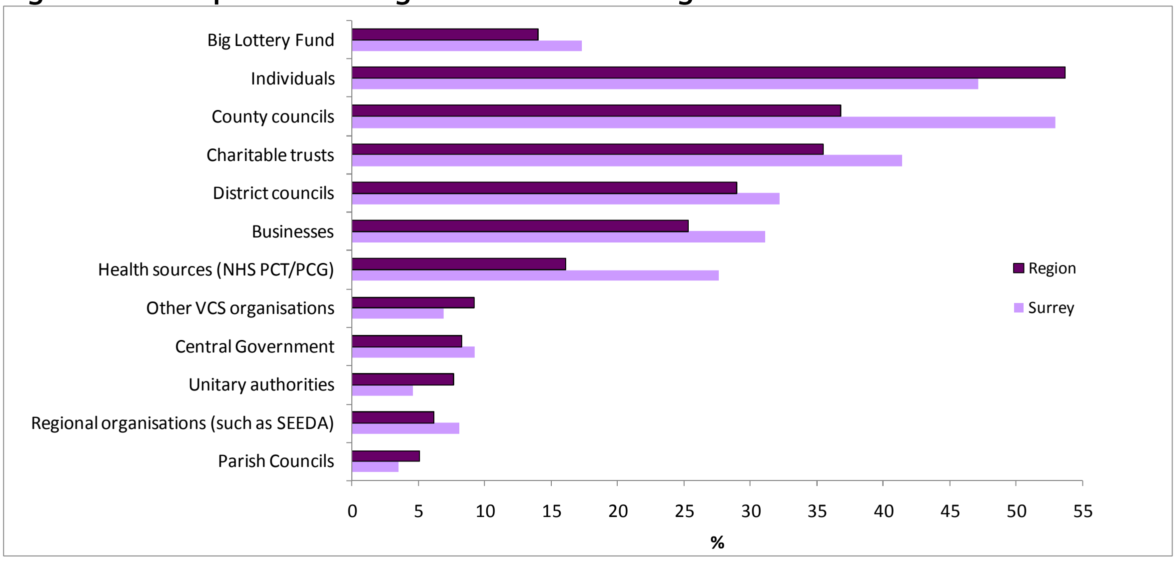
Note: base=87

2.17 These figures are generally in line with the regional data although Government grant aid is lower regionally (18%) and higher for sales of goods and services (37%).

2.18 The key source of income (Figure 2.8) is from County councils (53%), this appears much higher than the regional picture (37%). The secondary source of income in Surrey is Individuals (47%) highlighting how important donations are from the general public. This is slightly lower to the regional picture.

2.19 Income from District councils (32%), Businesses (31%) and Health sources (28%) appears higher in Surrey than across the region (12%, 25% and 20% respectively).

Figure 2.8: Proportion of organisations receiving income from sources



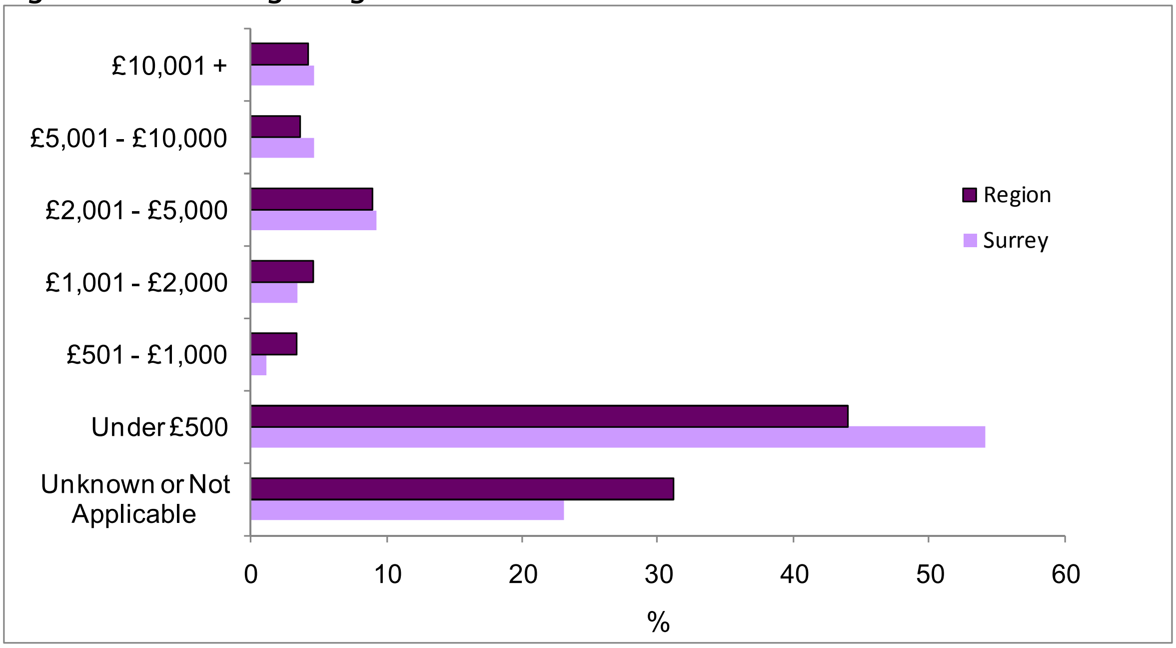
Note: multi-response, base=628/87

Training of staff and volunteers

2.20 Just over three-quarters of organisations (77%) have a training budget, demonstrating the importance they place on staff and volunteer development (Figure 2.9), slightly higher than the region (69%).

2.21 However, most organisations (54%) have very small training budgets of under £500. Again, higher than the region as a whole (44%).

Figure 2.9: Training budgets



Note: 2009 base =628/87

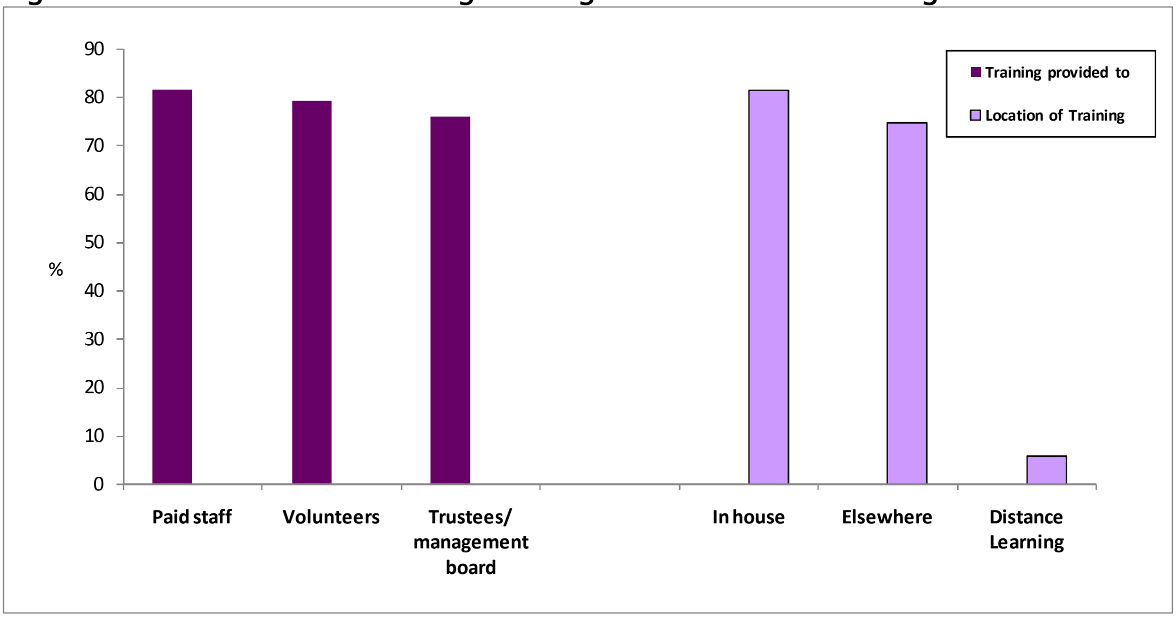
2.22 Training is provided to all types of staff involved in the sector by the vast majority of organisations surveyed (Figure 2.10), although proportionately figures look slightly higher for Surrey compared with the region.

2.23 Around three-quarters (76%) of respondents provide training to trustees/management board members; this is higher than the regional figure of 65%. Over four-fifths (82%) provide training to paid staff and 79% provide training to their volunteers, regional figures are 73% and 78% respectively.

2.24 This training predominantly takes place in-house (82%), where it may not be seen in the above training budget figures. This provides further evidence of a strong training culture across the sector.

2.25 There is clearly a desire to be more professional through training and development, something funding bodies must recognise when considering budget allocations.

Figure 2.10: Individuals receiving training and location of training



Note: base =87

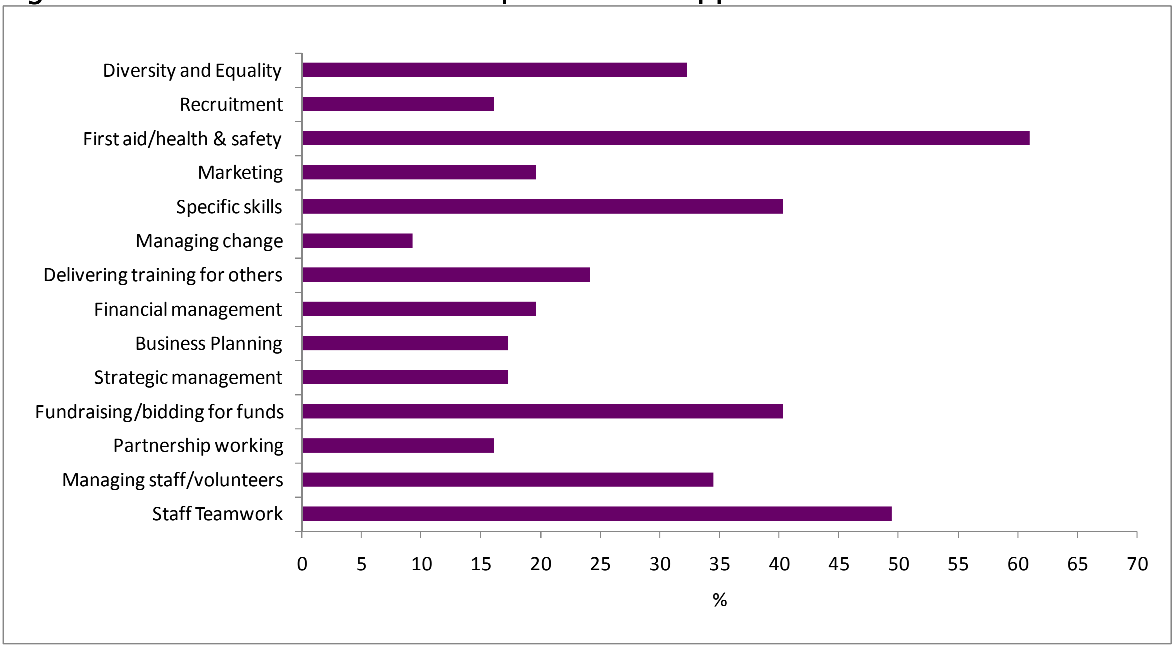
Areas of future development and support

2.26 Of the areas which respondents indicated that their organisations required additional training/support to enable them to be more effective over 30% felt that they and their staff would benefit from training or support in six main areas (Figure 2.11):

- first aid/health & safety (61%);
- staff teamwork (49%);
- fundraising/bidding for funds (40%);
- specific skills (40%);
- managing staff/volunteers (34%);
- diversity and equality (32%).

2.27 The proportion of organisations identifying areas for future development and support are lower than across the region. For example, 50% of organisations regionally requested specific skills training compared with 40% in Surrey.

Figure 2.11: Areas of future development and support



Note: multi-response, base=87

Expectations over the next few years

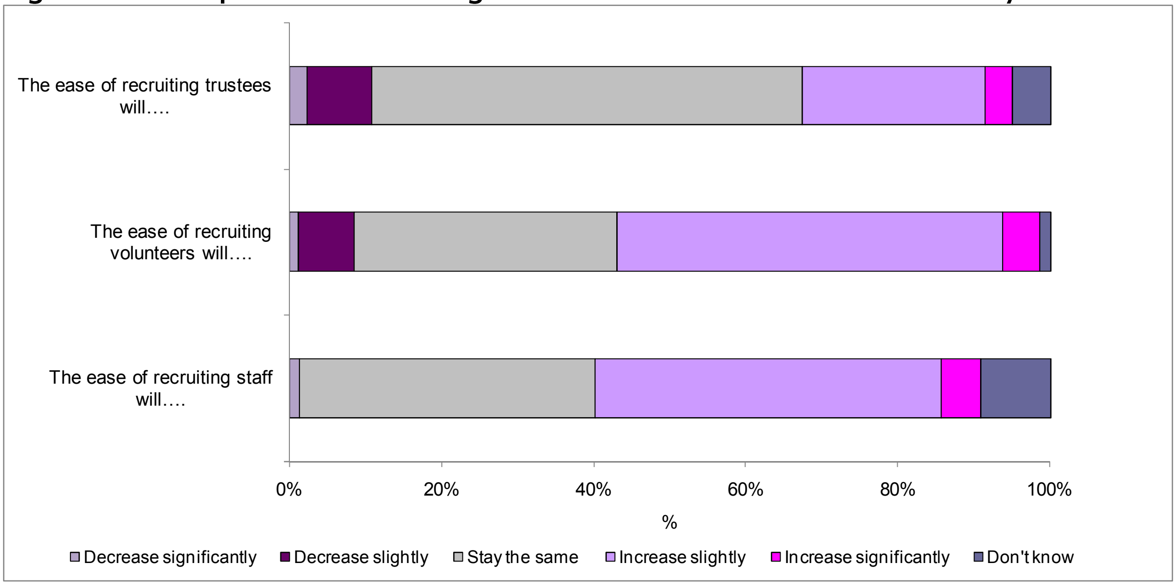
Recruiting people

2.28 Respondents were asked what their expectations of change were over the next three years, for the recruitment questions the majority of respondents felt that the ease of recruiting volunteers, trustees and staff would stay the same or it would get slightly easier (Figure 2.12).

2.29 The ease of recruiting trustees will increase slightly according to 23% of respondents with 8% perceiving that it would become slightly more difficult. The majority (54%) do not expect it to change. Recruiting volunteers is expected to be slightly easier for just under a half of respondents (47%) although around a third (32%) expect it to stay the same. Recruiting staff is expected to be slightly easier for two-fifths of respondents (40%) although a third (34%) expect it to stay the same.

2.30 Compared with regional figures respondents appear slightly more optimistic in Surrey, with larger proportions believing recruitment will become easier rather than no change.

Figure 2.12: Expectation of change in recruitment over the next three years



Note: base=87, single response per question

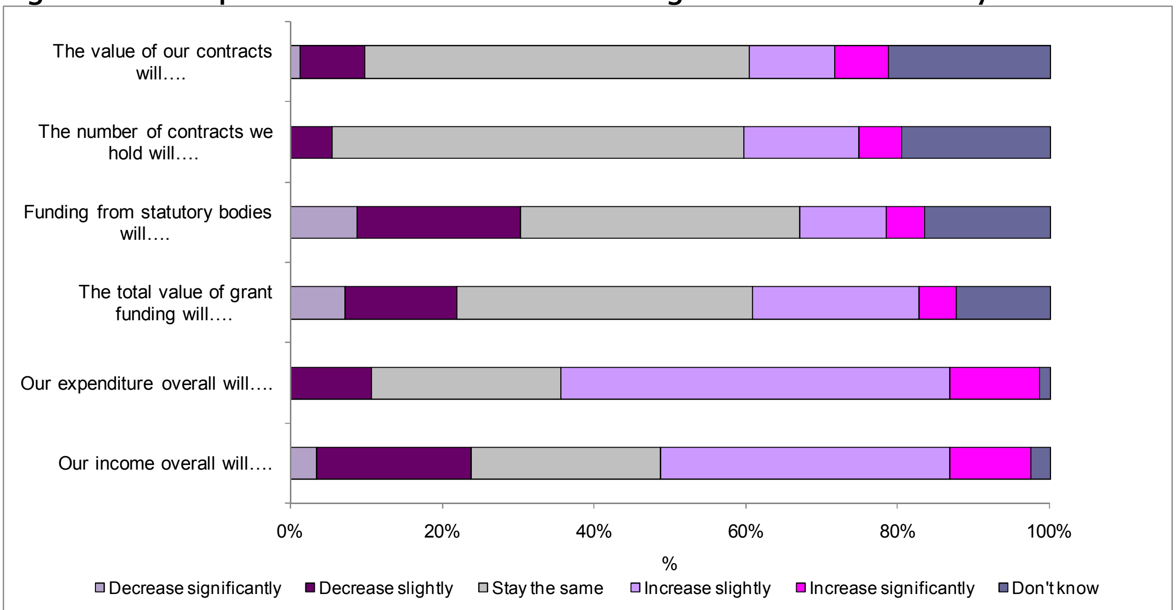
Financial factors

2.31 Expectations in relation to income, expenditure and funding (Figure 2.13) over the coming three years revealed some interesting perspectives:

- in terms of Number and Value of contracts and Grant funding the majority of respondents saw no change. However, of the minority that saw a change, more respondents expected slight increases rather than slight decreases;
- this optimistic outlook carried through to views on expenditure and income with large proportions expecting slight increases (49% and 37% respectively), although a minority expect slight decreases (10% and 20%);
- in terms of Funding from statutory bodies, more respondents expected slight decreases than slight increases.

2.32 These changes were similar to those at the regional level.

Figure 2.13: Expectation of income and funding over the next three years



Note: base=87, single response per question

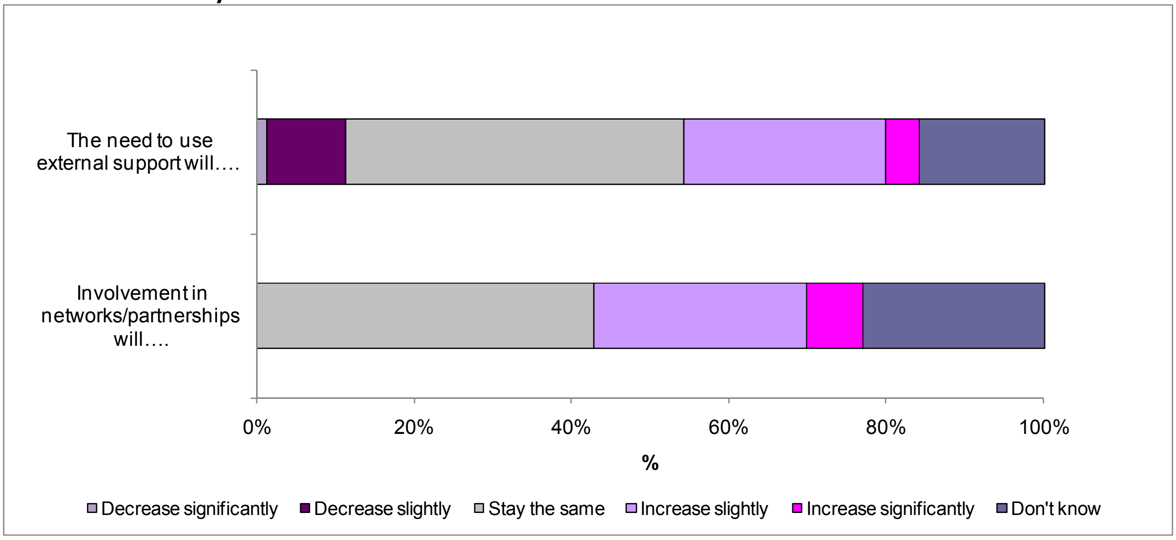
Partnership

2.33 Around a third (34%) of respondents felt that the need to use external support and their involvement in networks or partnerships would stay the same over the coming three years (Figure 2.14).

2.34 Just over a fifth felt that the need to use external support (21%) and their involvement in partnerships (22%) would increase slightly.

2.35 This is encouraging and indicates a strong propensity to develop joint working for those organisations.

Figure 2.14: Expectation of partnership involvement and external support over the next three years



Note: base=87, single response per question

2.36 These figures are similar to the regional level.

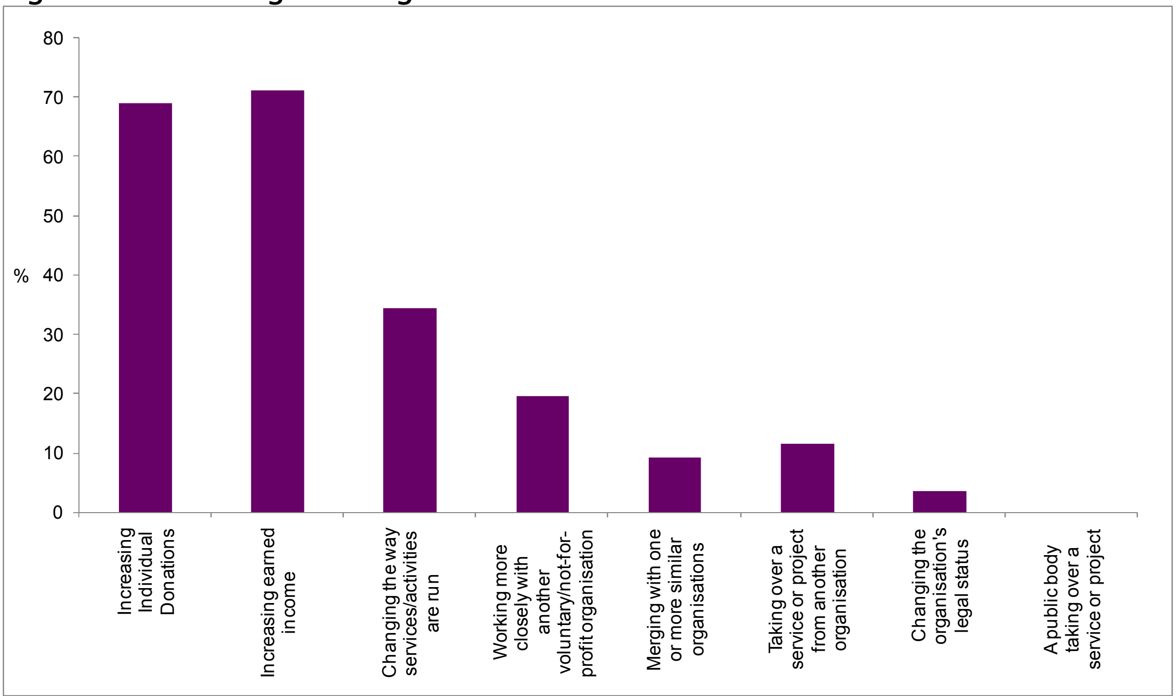
Strategies and funding sources to secure the future

2.37 Strategies to secure the future were focused on Increasing earned income (71%) or via Individual donations (69%).

2.38 Organisations are much less likely to be considering Changing their legal status or to Consider partnership or merger (Figure 2.15).

2.39 Operational partnerships can be challenging, especially where charities have clearly defined purposes which can make major changes problematic, certainly in the short term.

Figure 2.15: Strategies being considered to secure the future



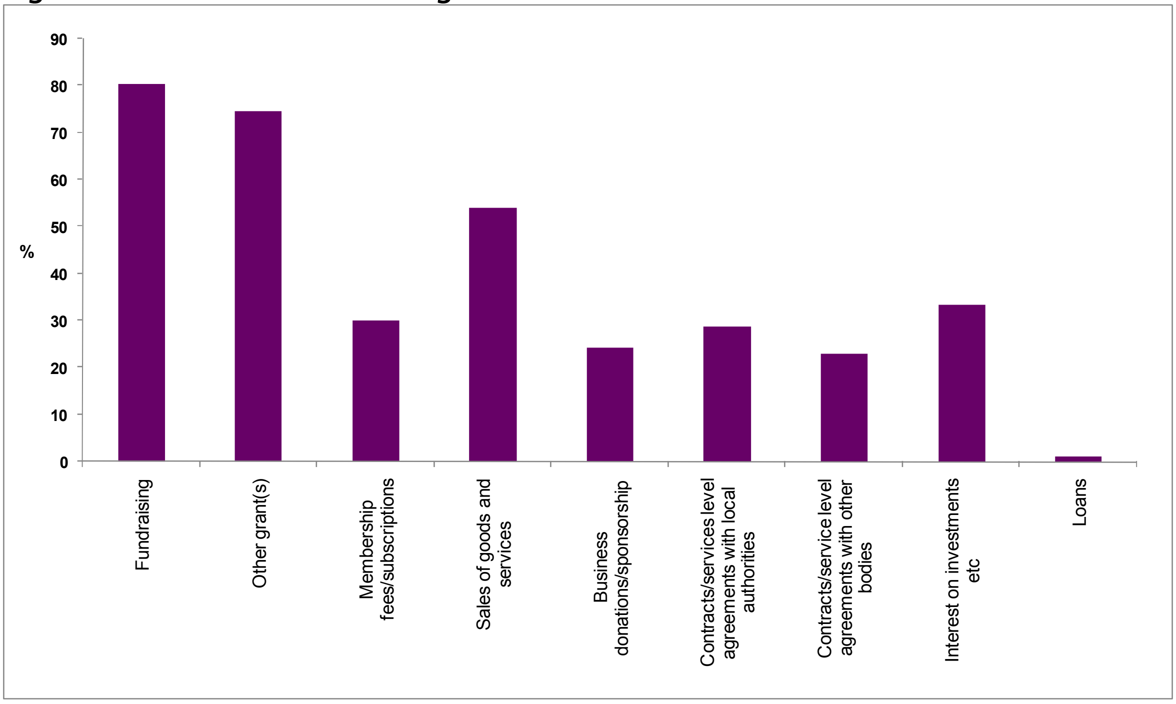
Note: base=87, multi-response

2.40 Organisations were asked what sources of funding they were actively seeking to secure their future; four-fifths (80%) were utilising Fundraising (Figure 2.16).

2.41 Other major sources included other Grants (75%), Sales of goods and services (54%), Interest on investments (33%) and Membership fees/subscriptions (30%). Other grants, Interest on investment and Membership fees are very similar to regional figures, whereas Sale of goods and services are higher (45% regionally).

2.42 Only 1% of respondents were using Loans, in line with the 1% regionally.

Figure 2.16: Sources of funding to secure future



Note: base=87, multi-response

APPENDIX A: STATISTICAL RELIABILITY

Statistical Reliability

The estimated sample errors associated with the survey are presented in the table below.

Area	Sample Size	Sample Proportion 10%	Sample Proportion 50%
SE Region	628	+/- 2.3%	+/- 3.9%
Berkshire	85	+/- 6.3%	+/- 10.6%
Buckinghamshire	44	+/- 8.8%	+/- 14.7%
Hampshire	113	+/- 5.5%	+/- 9.1%
Kent	65	+/- 7.3%	+/- 12.1%
Oxfordshire	96	+/- 5.9%	+/- 9.9%
Surrey	87	+/- 6.2%	+/- 10.4%
Sussex	130	+/- 5.1%	+/- 8.5%