

Making the Most of Collaborative Working

Dorset Charities Conference – June 2016



About Autism Wessex

- Vision

Our vision is of a world where people with autism are active citizens enjoying maximum independence and a good quality of life

- Values

Relationships of integrity and respect

Individual development, empowerment and quality of life

High quality, professional and needs led services

Equal Opportunity & Diversity

Value for Money



About Autism Wessex

- Early Childhood Autism – late 50s /' early 60s
- Parents – mutual support and information exchange
- Context of 'medical' society response and no state obligation to special education
- Driver of seeking educational and therapeutic response
- Formed Wessex Society for Autistic Children - 1968
- Provided informal home-based education



About Autism Wessex

- 1970 – Opened Portfield School
- By 1990 – Grown into 3 properties in Christchurch. 36 Students
- 1985 – Opened residential care home for 8 adults in west Dorset
- 1995 - Appointed General Manager
- 2001 – Appointed Fundraiser
- 2002 – First phase of ‘New’ Portfield School
- Investment and collaboration around adult residential care services
- Pursuit of virtuous cycle – growth, investment, improvement, growth



About Autism Wessex

- Three service areas:
 - Portfield School
 - Up to 70 places at main campus in west Parley and Life Skills centre in Christchurch
 - Community Wessex
 - Children's homes. 24 'Full Time' places in 5 homes + respite.
 - 33 adults in 10 residential care homes
 - Circa 3,000 hours supported living each week
 - Information, Advice and Advocacy Services
 - Manager, 2 x Information & Advice Officers, Volunteer Coordinator
 - Parent Training Programmes, Adult Drop In Groups, Parent Support Groups, Dorset 'Alert Card', Autism Database, awareness raising, Engagement in local policy scene



About Autism Wessex

- Portfield School and Community Wessex services provided under contract – LAs and CCGs
- Information, Advice and Advocacy services supported through voluntary income streams
- Business Services:
 - Finance
 - HR (to include Staff Development and Clinical Support)
 - Fundraising
 - Marketing
 - Data and IT
 - Facilities & Procurement





















About Autism Wessex – Some Numbers

- 60 school students
- 20 children in care
- 25 families using respite care
- 33 adults in residential care
- 3,000 hours/week supported living to circa 300 people
- 1,700 information and advice enquiries
- 45 drop in group attendees
- 100 parents trained
- Circa 500 FTE employees
- Turnover £11.6M
- Fixed Assets £14M
- Net Assets £12.5M



Key Success Factors

- Staying true to values and vision
- In recognising competitive arena
 - Pursuit of competitive advantage (quality and price)
 - Demonstrating impact and value added
- Securing a financial return
- Readiness to take risk
- Readiness to diversify if supportive of objects and vision
- Investment in assets – building a strong balance sheet
- Building and maintaining stakeholder trust and confidence
- In it for the long-term



Key Collaborations

- Our people
 - Competitive place in the employment market
 - Investing in their personal development
 - Aligned to the vision and values
- Customer statutory bodies
 - Good quality
 - Good price – values driven
 - Constructive engagement
 - No surprises
 - In it for the long term
- Donors and Grant Makers
 - Fulfilling the promise
 - Demonstrable impact
 - Constructive engagement



Key Collaborations

- Nat West Bank (who went out their way to support construction of the school)
 - Sound business model
 - Effectively managed (most of the time)
 - Meeting our obligations
 - No surprises
- Housing providers
- Statutory Services
 - NHS
 - Local authorities
- Wider Autism Sector
 - Learning and support
 - Macro policy and advocacy
 - National initiatives



Key Collaborations

- Regulators
 - CQC
 - Ofsted
 - Charity Commission
- Local Suppliers of Goods and Services
 - We are important part of local economy
 - Spend locally where we can
 - Pursue mutually beneficial relationships



Thank you

Any questions?

To learn more about how you can support us or benefit from our services visit:

www.autismwessex.org.uk



DORSET CHARITIES CONFERENCE
13TH JUNE 2016, WIMBORNE



KINDLY PRINTED BY:



Charity Accounting and Tax Update

Jen Richardson ACA FCCA DChA

- New SORP
- Risk management
- Gift Aid
- Charity finance resources

New SORP

- <http://www.charitiessorp.org/>
- The Charities SORP(FRSSE) will not apply from 2016
- Transition to FRS102 SORP a single reporting framework for all charities.

Key changes under FRS102 SORP

- Changes to Trustee Report
- SOFA format
- Income recognition
- Property and Investment property valuations
- Lease commitments
- Remuneration disclosures

Risk management

- Definition of risk: 'something that might or might not happen but if it does could stop you achieving your objectives'.
- Risk management: 'any activity taken to identify and then control the level of risk'.

Steps to managing risk

1. Be clear about what you are trying to achieve
2. Identify, analyse and assess the risks
3. Decide how to manage the risks
4. Monitor and review the risks
5. Communicate and report to the right people

Gift Aid

‘A donation qualifies for Gift Aid if it’s a gift consisting of ‘a sum of money’ by an individual who’s paid, or will pay UK tax, to a charity and satisfies relevant conditions’

Gift Aid – qualifying donations

A sum of money (an actual cash transaction) and NOT

- Subject to any repayment conditions
- A waiver of a debt
- A payment for goods or services
- Given under the payroll giving scheme
- Not deductible from income for tax purposes
- A ‘disqualified’ overseas gift
- Charity cards or vouchers
- Membership fees of CASCs
- In excess of donor benefit rules
- Made before registration as a charity or CASC

Gift Aid - donors

- Must have paid sufficient UK income or capital gains tax
- Complete a valid gift aid declaration form
 - Including name, address, name of charity, agreement for gift aid, declaration of sufficient tax paid.
 - See HMRC template examples <https://www.gov.uk/gift-aid-declarations-claiming-tax-back-on-donations>
- Made aware of personal tax consequences
- No additional benefit for basic rate tax payers
- Oral declarations need to contain the same information as written declarations

Gift Aid Small Donation Scheme

- Can only apply to cash donations
- Limit is £20 per donation
- Can claim with no gift aid declaration
- Cannot apply to membership fees
- Maximum amount in one year now £8,000 or ten times the amount claimed through gift aid
- Charity must have made a gift aid declaration in year
- Charity must have claimed gift aid in two of the last four years
- GASDS claim is not allowable if a gift aid penalty has been received in the last two years
- Connected charities share the limit

Additional resources

- ICAEW Volunteers

Email: icaewvolunteers@icaew.com

Phone 020 7920 3538

- Fraud Advisory Panel

www.fraudadvisorypanel.org

- Trustees Unlimited

www.trustees-unlimited.co.uk

Jen Richardson BA (Hons) ACA FCCA DChA
Head of Charities

T : 01202 875 900 F : 01202 876 288 E :

Jen.Richardson@wardgoodman.co.uk

**A : 4 Cedar Park, Cobham Road, Ferndown Industrial Estate, Wimborne,
Dorset, BH21 7SF**



DORSET CHARITIES CONFERENCE
13TH JUNE 2016, WIMBORNE



KINDLY PRINTED BY:



Charities – Legal Update

Geoff Trobridge - Partner

June 2016



Daily Mail
Easiest ever way to get a **FLAT TUN**
FREE FLEECE FOR EVERY READER
After Mail exposes how they prey on elderly, MPs order 'incompetent' bosses to clean up their act
SHAMING OF THE CHARITY CHIEFS
15 video threat to

The Mail
ON SUNDAY
FEBRUARY 2, 2008 £3.00
MARY BERRY
FREE 24-PAGE GLOSSY RECIPE PULLOUT
PLUS
FREE CHICKEN FROM M&S
IN YOU MAGAZINE

THE TIMES
Thursday August 14 2007 £5.00
Only 50p per copy
2
Inside Mary Berry's easy baking guide
The woman who set exams for

Cameron accused as troubled charity fails
PM 'incriminated' by founder of Kids Company
Ailing children, charity was plagued by problems every time David Cameron was interviewed by the media. It was a disaster for the PM, who was accused of being a 'troubled' charity. The charity, which was founded by Cameron's friend, the late Lord Cameron, was accused of being a 'troubled' charity. The charity, which was founded by Cameron's friend, the late Lord Cameron, was accused of being a 'troubled' charity.

Charity Commission investigating claims that soldiers' welfare at risk
Whistleblowers complain of bullying as seven staff quit
HELP FOR HEROES IN SHOCK CHARITY PROBE
By Mark Mical
DEFENCE CORRESPONDENT
BRITAIN'S biggest veterans' charity is being investigated amid claims it failed some of the poorest of our war-torn soldiers. The charity, which was founded by Cameron's friend, the late Lord Cameron, was accused of being a 'troubled' charity.

Daily Mail
WEDNESDAY, SEPTEMBER 2, 2005
www.dailymail.co.uk
60p
BEST EVER BREAD
THE GREAT BRITISH BAKE OFF
MOUTHWATERING PULLOUT INSIDE
REVEALED: HOW RSPCA SNOOPS ON WILLS OF DONORS
Strictly siren's back - lock up your hubbies!
SEE PAGE SEVEN

IN THE NEWS
Charity charged
Ailing children, charity was plagued by problems every time David Cameron was interviewed by the media. It was a disaster for the PM, who was accused of being a 'troubled' charity. The charity, which was founded by Cameron's friend, the late Lord Cameron, was accused of being a 'troubled' charity.

England expects
The charity, which was founded by Cameron's friend, the late Lord Cameron, was accused of being a 'troubled' charity. The charity, which was founded by Cameron's friend, the late Lord Cameron, was accused of being a 'troubled' charity.

Daily Mail INVESTIGATIONS UNIT
The charity, which was founded by Cameron's friend, the late Lord Cameron, was accused of being a 'troubled' charity. The charity, which was founded by Cameron's friend, the late Lord Cameron, was accused of being a 'troubled' charity.

THE RSPCA pays investigators to assess how much money donors might leave in their wills, the Mail can reveal today.
The charity, which was founded by Cameron's friend, the late Lord Cameron, was accused of being a 'troubled' charity. The charity, which was founded by Cameron's friend, the late Lord Cameron, was accused of being a 'troubled' charity.



Charities (Protection and Social Investment) Act 2016

CHAPTER 4

Explanatory Notes have been produced to assist in the
understanding of this Act and are available separately

£6.00



Charities (Protection and Social Investment) Act 2016

- ➔ Warnings
- ➔ Suspension of trustees after an inquiry has been opened or interim manager appointed.
- ➔ Commission can make a scheme if an inquiry has been opened and either misconduct/ mismanagement OR necessary to protect property.
- ➔ Commission can remove trustees if both misconduct/ mismanagement AND necessary to protect property.
- ➔ Disqualification
 - ➔ Range of offences leading to automatic disqualification widened
 - ➔ CC can remove a disqualified trustee
 - ➔ CC can disqualify anyone from acting whether or not currently a trustee
 - ➔ Includes – trustees, employees and officers

Control of Fundraising

- ➔ Commercial Fundraising Agreements:
 - ➔ Must specify any voluntary scheme or standard by which fundraiser or commercial participator agrees to be bound
 - ➔ How vulnerable people will be protected
 - ➔ Arrangements for charity to monitor compliance
- ➔ Annual reports – statements about fundraising

Social Investment

- ➞ Directly furthering the charity's purposes
- ➞ Achieving a financial return for the charity
- ➞ Any financial return that is better than spending the money on the purposes
- ➞ Trustees' duties in relation to social investment



Register of Persons with Significant Control

- ➞ All charities set up as a company
- ➞ All trading subsidiaries
- ➞ Compulsory even if there is no-one with Significant Control



Action Points

- ➔ Do not ignore problems and take early advice
- ➔ Review trustees' declarations
- ➔ Review governing document to allow removal of trustees
- ➔ Employment – due diligence
- ➔ Review fundraising agreements
- ➔ Record and justify decisions

How this man caused a problem with the Charity Commission



Geoff Trobridge | Partner

Geoff advises charities, social enterprises and voluntary organisations, clubs or associations on all aspects of charity and company law. Geoff can support you from the outset, with setting up your organisation to ensure it has the optimised legal structure alongside the right governing document.

☎ 01202 786138

☎ Geoff.Trobridge@LA-law.com





DORSET CHARITIES CONFERENCE
13TH JUNE 2016, WIMBORNE



KINDLY PRINTED BY:

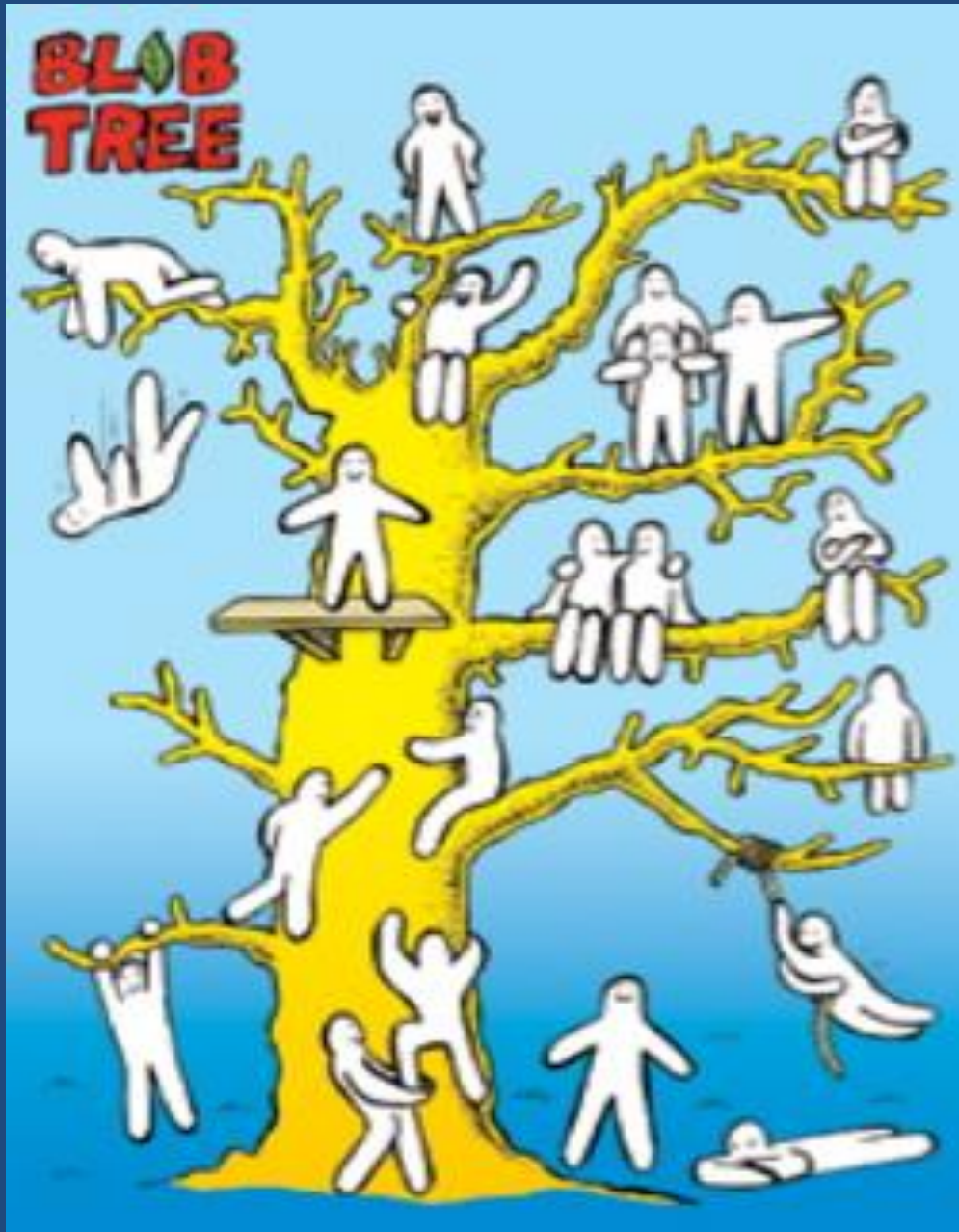




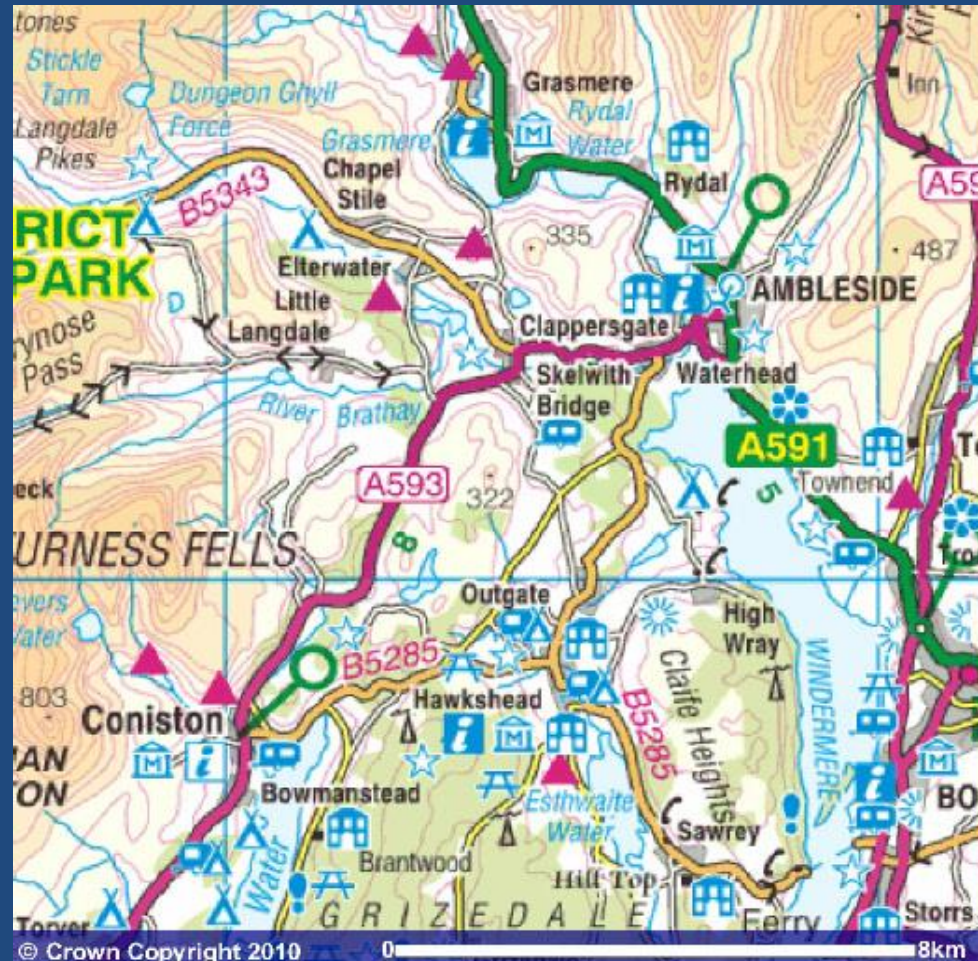
Charity Insurance

Here to help





A new map



All Change!



The Insurance Act



Insurance Act 2015



*The Insurance Act 2015
requires customers to make a
‘fair presentation’ of the risk.
This requires the policyholder
to undertake a reasonable
search of the information
available to them and defines
what a policyholder knows or
ought to know.*



Fair Presentation

Knowledge of:-

- Senior Management
- Other decision makers
- Your insurance team
- Changes mid-term

Reasonable Search



Warranties





Claims

**PAID IN
FULL**



Claims

UNPAID

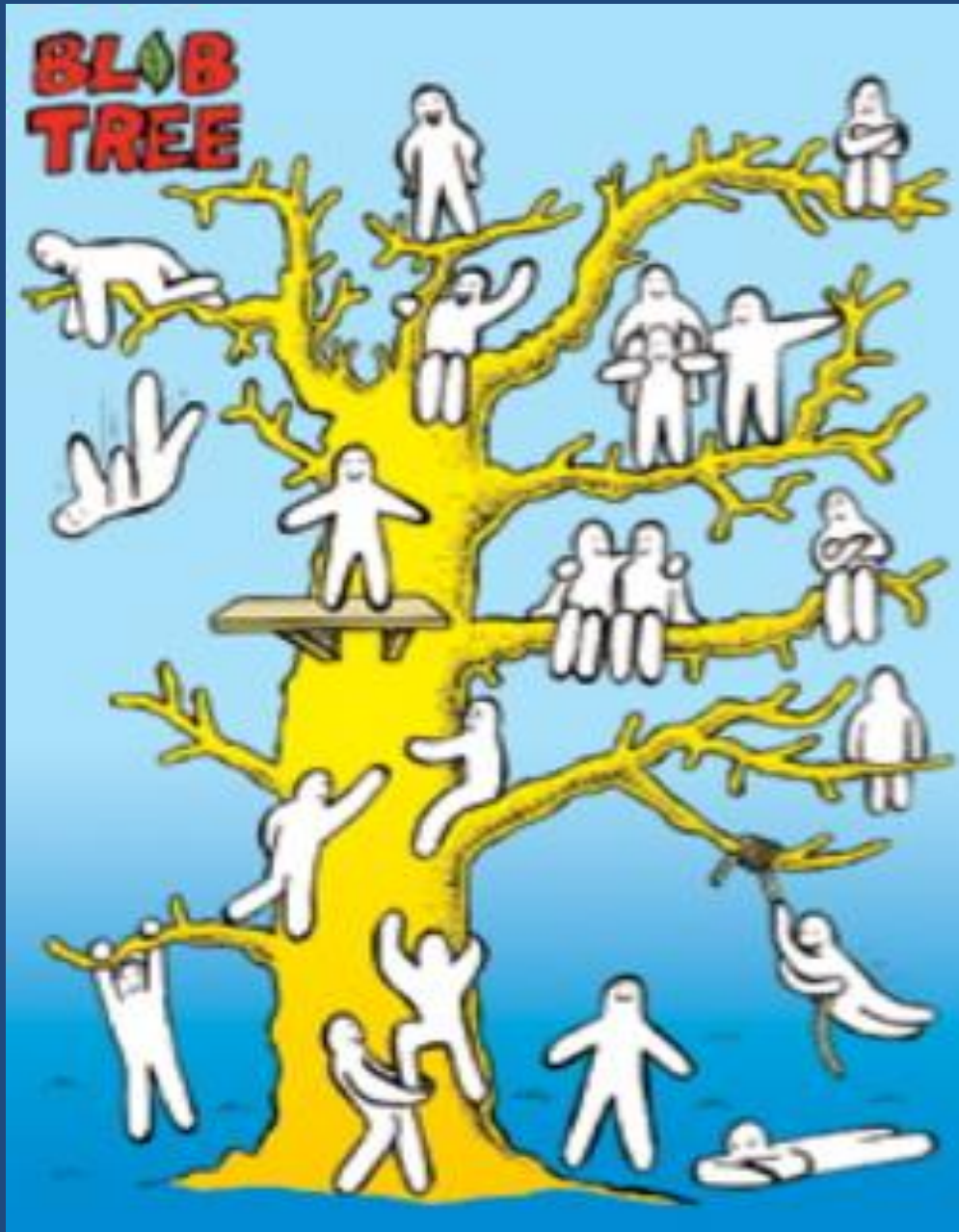
Who arranges?





Practical stuff

- Involving management
- Recording decisions made internally
- Recording broker correspondence
- Quality of advice essential!
- If in doubt, disclose it anyway!



Let's do it together





DORSET CHARITIES CONFERENCE
13TH JUNE 2016, WIMBORNE



KINDLY PRINTED BY:



Socially Responsible and Impact Investing

Presented by Alex Foster

What is socially responsible investment and Impact investing?

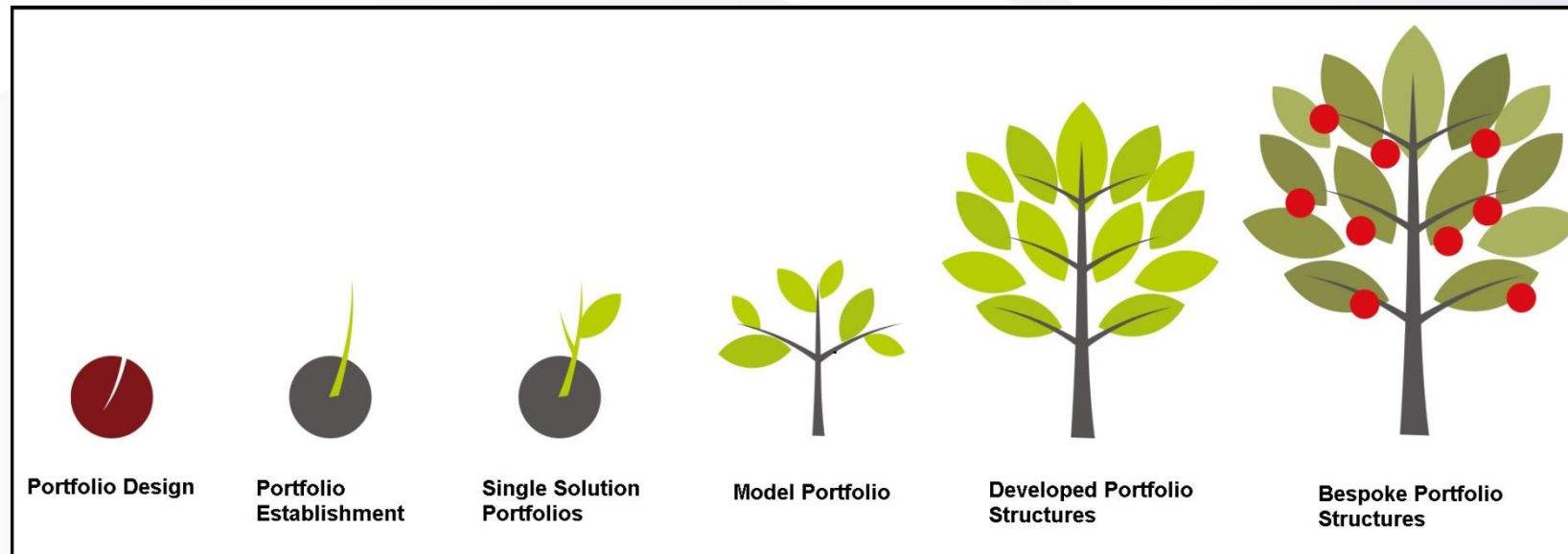
- **Socially responsible investment**, which can often be interchangeable with green, sustainable or ethical investing, looks to consider the nature of the business that a company chooses to engage in.
- **Impact investing**, has been used for several years, with the terms being coined around 2007. This investment strategy is focused more on the Corporate Social Responsibility of a company.

Why use socially responsible investment and Impact investing strategies?

- *‘We want to avoid companies that harm social or environmental practices’*
- *‘We want to reflect the principles of our organisation in the investments that we hold’*
- *‘Our investments should have positive benefit to issues that are important to us’*

How to invest in socially responsible and Impact investments.

- Direct with Fund Managers
- Via a Stockbroker
- Specialist Financial Planners



Summary

- Ward Goodman are here to provide comprehensive solutions through our integrated and modern thinking.
- Cash holding and portfolio reviews are essential, whichever advisers you use!



DORSET CHARITIES CONFERENCE
13TH JUNE 2016, WIMBORNE



KINDLY PRINTED BY:



Making Documents Efficient

Ben Summerfield, Director, Copyrite Business Solutions



Agenda

- Who are Copyrite Business Solutions
- Business challenges
- How do we address them

Sources:

IDC

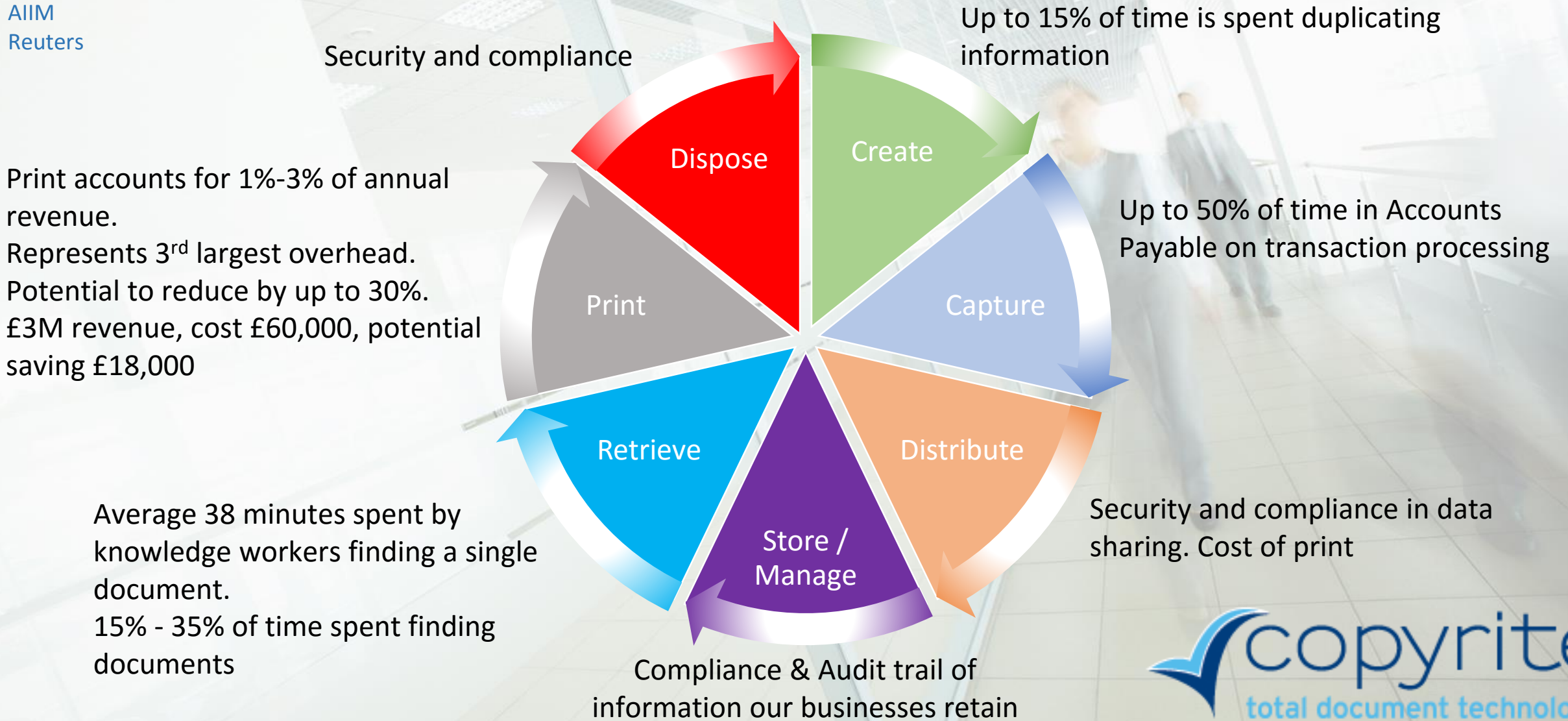
Gartner

Working Council of CIO's

AIIM

Reuters

Document Lifecycle



Top 5 Tips for going Paper-Light

1. Map processes prior to digitisation
2. Look to digitise paper as early in the process as possible
3. Use electronic workflows
4. Use print management
5. Implement document retention policy

Thank you



DORSET CHARITIES CONFERENCE
13TH JUNE 2016, WIMBORNE



KINDLY PRINTED BY:



Trustees under pressure: governance responsibilities of Chairs and trustees in challenging times

Dorset Charities Conference June 13 2016

John Williams
Vice Chair, Association of Chairs

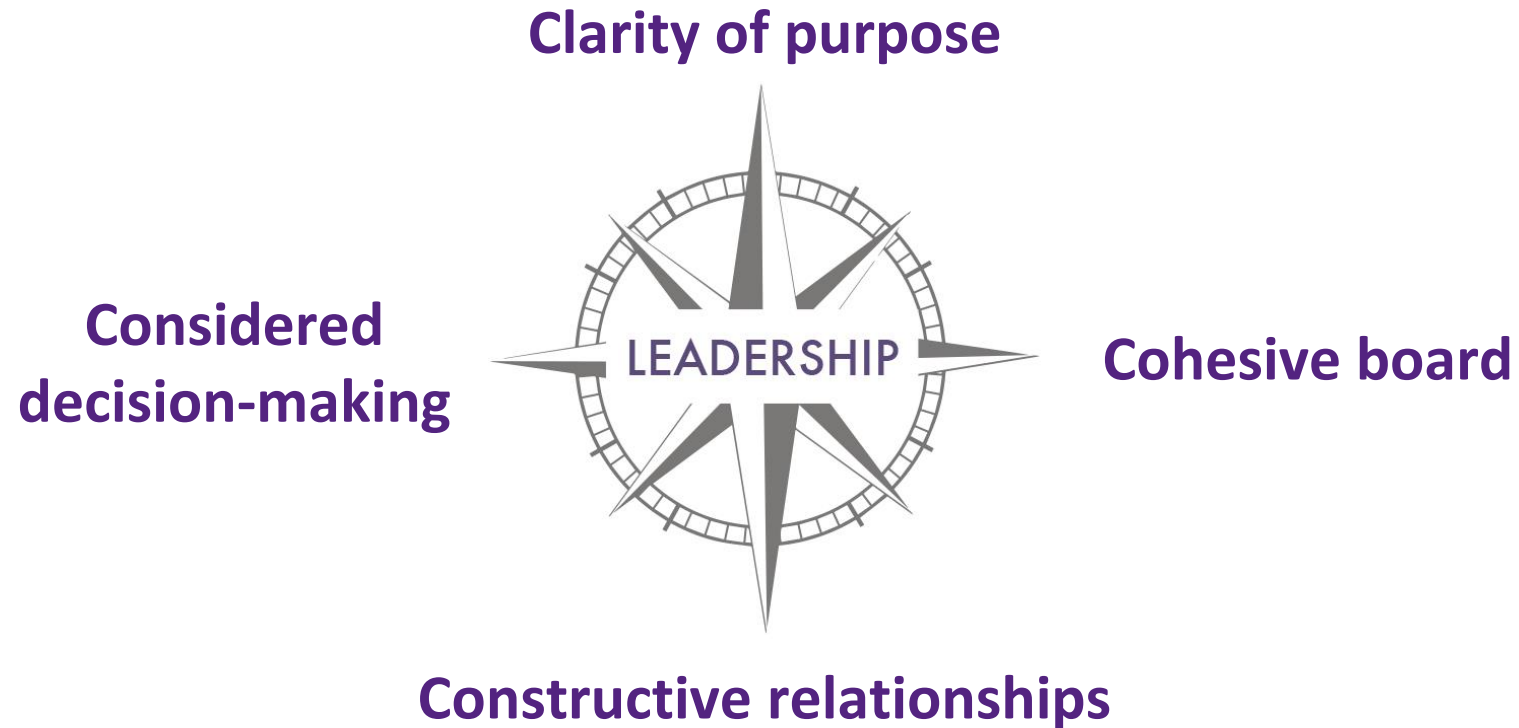
@ChiswickJohn

www.associationofchairs.org.uk

About the Association of Chairs

- Launched October 2013
- 4 aims:
 - Support, challenge and networking
 - Develop knowledge and resources
 - Offer professional development and standards
 - Create a voice for Chairs

A Chair's Compass - the 4 C's



**Association
of Chairs**

A year of bad headlines



Association
of Chairs

But some important lessons....

What lessons do you think 2015 offers?

What have you done differently in your organisations as a result?

Why it matters - the new normal

Tighter regulation

Tighter money

Tighter scrutiny



Association
of **Chairs**

One clear lesson so far....

The buck stops with trustees.....

and especially the Chair....

Good governance really really matters

Revised guidance from the Charity Commission: The Essential Trustee



Seven deadly sins of bad governance

- No formal board evaluation
- Lack of finite terms/poor governing document
- Not enough attention on sustainability and risk
- Skimping on trustee recruitment
- Lack of engagement between meetings
- Lack of respect, especially for SMT
- No investment in induction and training



Association
of **Chairs**

Closing the Governance Gap



Association
of **Chairs**

What is governance?

from the chief executive of **CCLA**, Michael Quicke:

“the mechanism by which the organisation controls the energy driving it forward”



Association
of **Chairs**

Building better governance

Compliance, culture and commitment

22 small steps to big differences



Association
of **Chairs**



Association
of **Chairs**



Association
of **Chairs**

For every trustee

- Take governance seriously
- Ensure you understand the expectations: a social contract
- A deep induction; and training as default?
- Compulsory attendance
- Read the papers!
- Get involved: under the skin; engage the beneficiaries, staff and volunteers
- Support your Chair

for Chairs and the board...1

- Ensure effective challenge – Chair sets the tone
- Right agenda, good papers, prioritise, open debate
- Keep risk and sustainability under constant review, internal and external
- Don't delegate financial responsibility
- Get the right board skills mix: recruit conscientiously
- Invest in their training and development
- Give trustees off-board roles, opportunities to bond

for Chairs and the board...2

- Ensure turnover of trustees: stick to terms
- Ensure your governing document is fit for purpose
- Create a Vice Chair or SID
- Identify a governance trustee
- Regular (formal) board review and appraisals
- Listen to expert voices, peers and mentors
- Measure, measure, measure (and report)
- Engage, listen to and respect the CEO and their executive

From Five S's to Five C's

Contract

Commitment

Curiosity

Comprehension

Challenge



Association
of **Chairs**

Trustees under pressure: governance responsibilities of Chairs and trustees in challenging times

Dorset Charities Conference June 13 2016

John Williams
Vice Chair, Association of Chairs

@ChiswickJohn

www.associationofchairs.org.uk



DORSET CHARITIES CONFERENCE
13TH JUNE 2016, WIMBORNE



KINDLY PRINTED BY:





heritage lottery fund



Awarding funds from

The National Lottery[®]

National Lottery Funding

Arts Council England

BIG Lottery fund

Heritage Lottery Fund

Sport England



Awarding funds from

The National Lottery®



National Lottery Funding

- Since 1994, more than £32 billion has been raised for good causes, funding over 450,000 projects
- Heritage Lottery Fund has awarded £7.1 billion to over 40,000 projects since 1994
- £430 million to invest this year



Impacts of 20 years of Heritage Lottery Funding

- 50% increase in visitors to key heritage attractions
- Over 3,000 people have undertaken work-based training in heritage skills
- Millions of people engaging with heritage, including 234,000 volunteers
- Over 17,000 historic buildings and monuments restored
- The revitalisation of over 700 public parks



What is Heritage?

Heritage Lottery Fund takes a broad view of the UK's heritage.....

.... It is anything from the past that we value enough to hand on to future generations



Historic Buildings and Sites



Museums, Collections and Archives



Industrial, Transport and Maritime



Countryside and Nature



Cultures and memories

First World War



- HLF are actively seeking projects to commemorate the First World War through our open programmes
- With our funding, we want to help create a deeper understanding of the First World War and to create a legacy for future generations

Priority Development Areas 2013-2018

Bournemouth

Christchurch

East Dorset

Poole

2002-2012

27 grants awarded £3,062,400

Funding in Priority Development Areas 2013 - present

30 grants awarded £6,658,290

including grants to:

- Highcliffe Castle, Christchurch
- RSPB
- Poole Museum
- St Peter's church, Bournemouth
- Hengistbury Head



Key Target Groups



HLF is actively looking to support projects which engage hard to reach groups of people who don't normally engage with heritage, including:

- Equalities groups
- Disabilities groups
- Young people (aged 11-24)
- People living in areas of social and economic deprivation

Who can apply?

Public and Not-for-profit organisations

- Community or voluntary groups
- Charities or trusts
- Youth clubs or organisations
- Parish councils
- Local authorities
- Other public sector organisations



Grants Awarded in Dorset 2015/2016

- Boscombe CIC
- Russell-Cotes Art Gallery and Museum
- Christchurch History Society
- RSPB South West
- Red House Museum
- Christchurch Culture and Learning Arena
- Radio Wimborne
- Wareham Development Trust
- Dorset Castles Research group
- Dorset Natural History and Archaeological Society
- Somerset and Dorset Railway Trust

Main Funding Programmes

- | | |
|-------------------------------|---------------------|
| • Sharing Heritage | £3,000 to £10,000 |
| • First World War: Then & Now | £3,000 to £10,000 |
| • Young Roots | £10,000 to £50,000 |
| • Our Heritage | £10,000 to £100,000 |
| • Heritage Grants | over £100,000 |



Outcomes

We want applicants to focus on the outcomes of the project.

The outcomes are the difference that will be made with Lottery money.

To help applicants, we have created a menu of outcomes:

- heritage
- people
- communities



What is the difference between an outcome and an output?

- Lots of funders talk about **outcomes** and **outputs**
- An **output** is essentially something that is done or created; an **outcome** is the difference made
- So, an **output** may be a new interpretation display for a museum, the **outcome** is that people can now learn about heritage.



HLF Outcomes

Heritage will be ...

- Better interpreted and explained
- In better condition / better managed
- Identified/recorded

People will have ...

- Changed their attitudes and/or behaviour
- Developed skills / volunteered time
- Learnt about heritage / had an enjoyable experience

Community ...

- More people and wider range of people engage with heritage

Unheard Voices



Applicant: Bournemouth People First

- 2 year project to record memories, feelings and experiences of people with a learning disability
- Employed learning disabled person as project trainee
- Provided workshops for education and public sector workers

Wimborne History Festival

Applicant: Christchurch and East Dorset Councils

Working with 19 partner organisations to deliver a programme of public engagement events including:

Wimborne Minster

Dorset History Society

Priest's House Museum

Wimborne Model Town

National Trust, Kingston Lacy



HLF Funding

- Heritage focussed projects achieving outcomes for Heritage, People and Communities
- Not-for-profit and public organisations can apply
- Project funding – not for ongoing work or current staff
- Grants from £3,000
- Can fund 100% of project costs
- Open programmes, apply when you are ready
- 8 -12 week assessment period
- Online enquiry service and online application process

Contact Us



Heritage Lottery Fund,
3rd Floor, Balliol House,
Southernhay Gardens
Exeter, Devon, EX1 1NP

southwest@hlf.org.uk

www.hlf.org.uk





DORSET CHARITIES CONFERENCE
13TH JUNE 2016, WIMBORNE



KINDLY PRINTED BY:



NAVIGATING CHANGE

AN ANALYSIS OF FINANCIAL
TRENDS FOR SMALL AND
MEDIUM-SIZED CHARITIES

Jennifer Crees

Senior Research Officer, NCVO

June 2016

Background

- Lloyds Bank Foundation commissioned report
- Anecdotal evidence of 'squeezed middle' of charities
- Tougher commissioning environment, reduction in grants
- Aim was to investigate whether evidence from financial accounts supported this
- Partner publication by IPPR North: qualitative review of value of small and medium-sized charities



Definition of small and medium charities

Charity Commission income bands	NCVO Category
Zero income	Micro
£1 - £10,000	
£10,001 - £25,000	Small
£25,001 - £100,000	
£100,001 - £500,000	Medium
£500,001 - £1,000,000	
£1,000,001 - £10,000,000	Large
£10,000,001 - £100,000,000	Major
Over £100,000,000	Super-major

Our approach and data

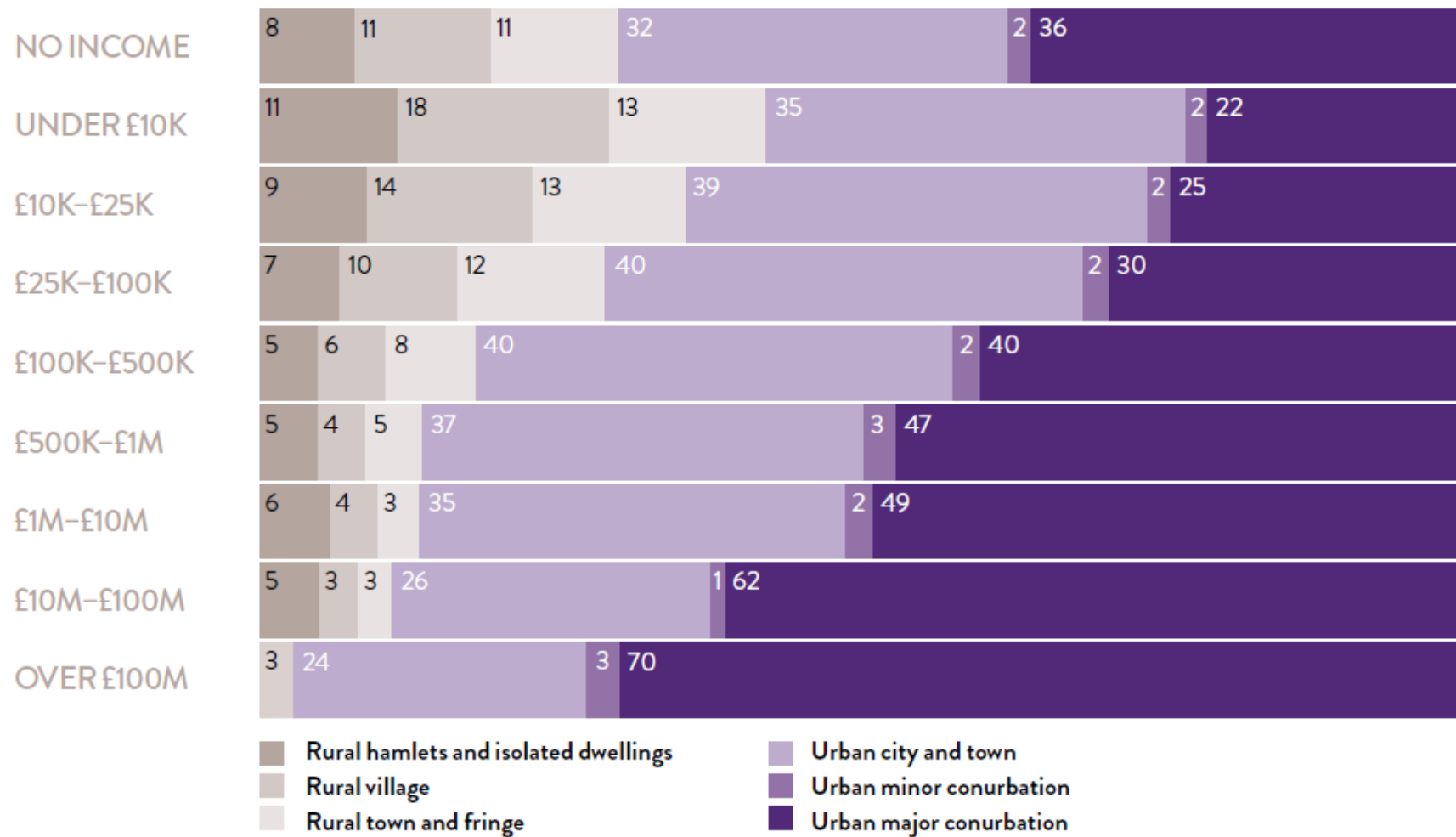
1. High level overview of the voluntary sector: numbers and key characteristics (CC data)
2. Detailed aggregate financial statistics on income and spending between 2008/09 and 2012/13 (Almanac data & methodology)
3. New 'typology' based on trajectory of organisational income between 2008/09 and 2013/14: facilitate comparison (CC data).
4. Analysis of text from charity accounts.

SMALL AND MEDIUM-SIZED CHARITIES OVERVIEW

The voluntary sector's economy is dominated by large charities, but most organisations are small:

Income band	Number of organisations	Annual income
Zero income	14792	£0bn
£1 -£10,000	49891	£0.2bn
£10,001 -£25,000	22318	£0.4bn
£25,001 -£100,000	23801	£1.2bn
£100,001 - £500,000	15052	£3.3bn
£500,001 - £1,000,000	3115	£2.1bn
£1,000,001 - £10,000,000	3854	£10.3bn
£10,000,001 - £100,000,000	494	£11.5bn
Over £100,000,000	38	£7.6bn

Smaller charities are more likely to be registered in rural areas than larger charities: Proportion of charities in rural and urban areas by income band, 2013/14 (%)

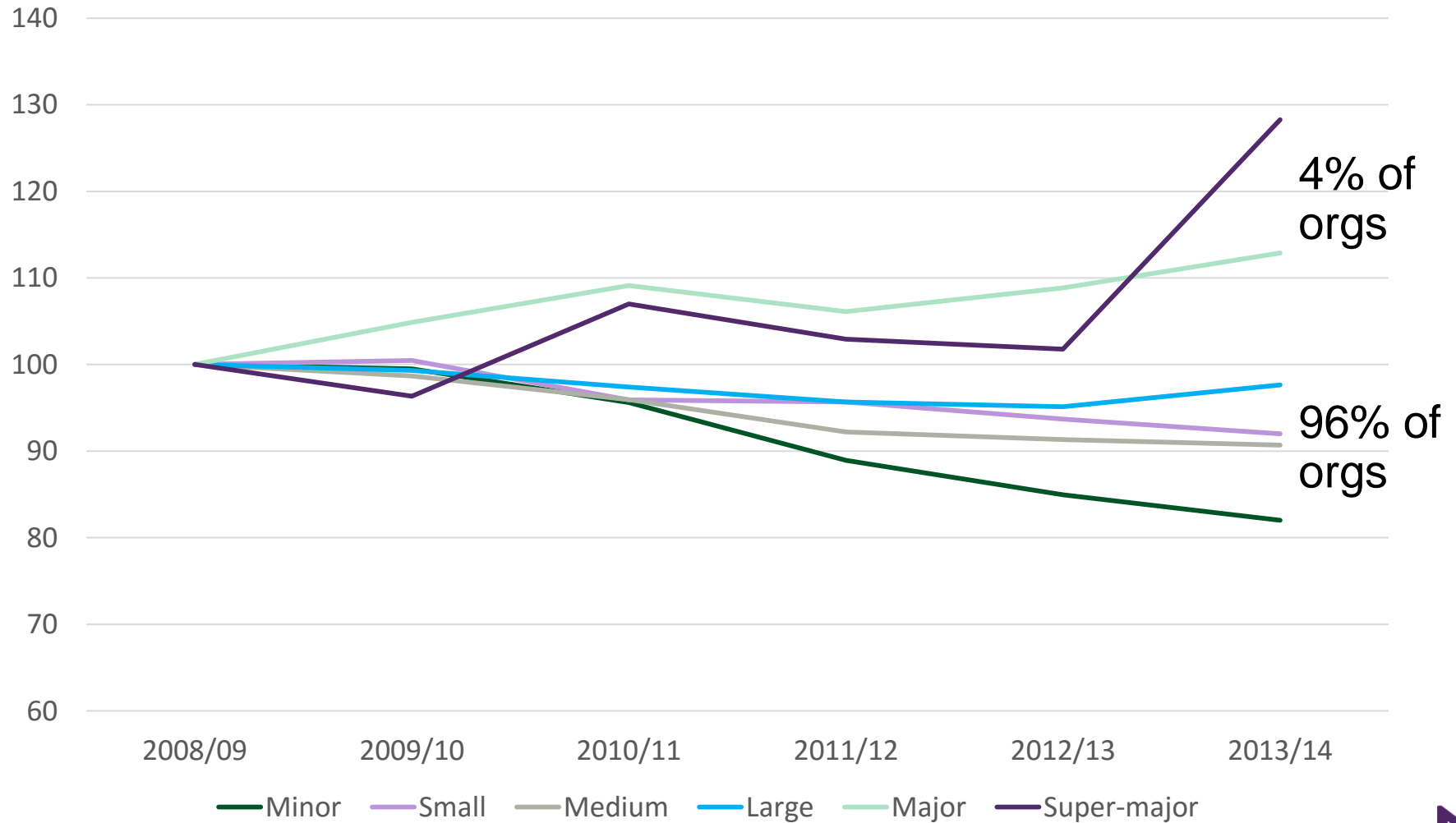


FINANCIAL TRENDS FOR SMALL AND MEDIUM-SIZED CHARITIES

The rise of super-major charities

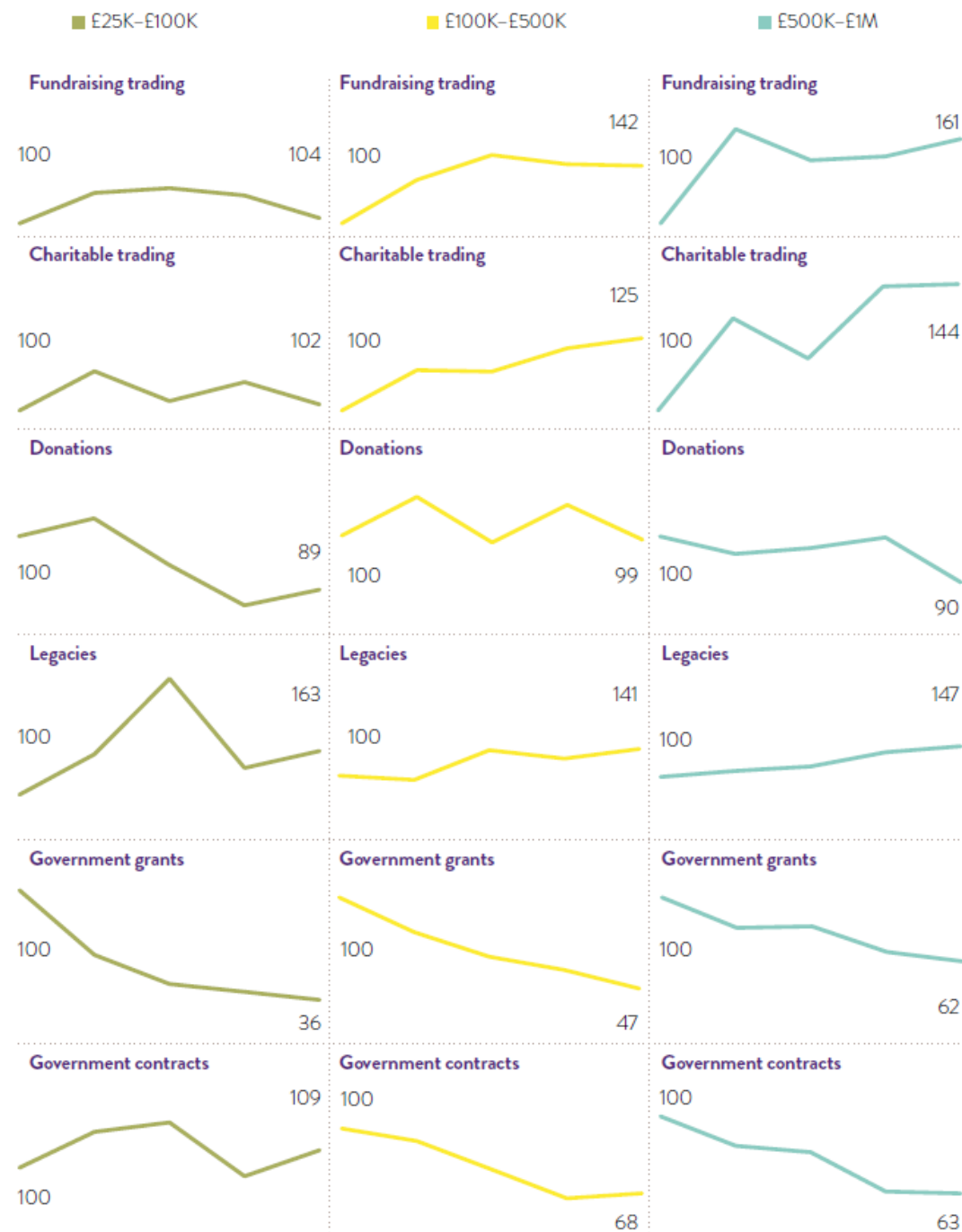
Overall income by income band, cumulative change, 2008/09 to 2013/14 (2008/09 = 100)

Source: NCVO, TSRC, Charity Commission



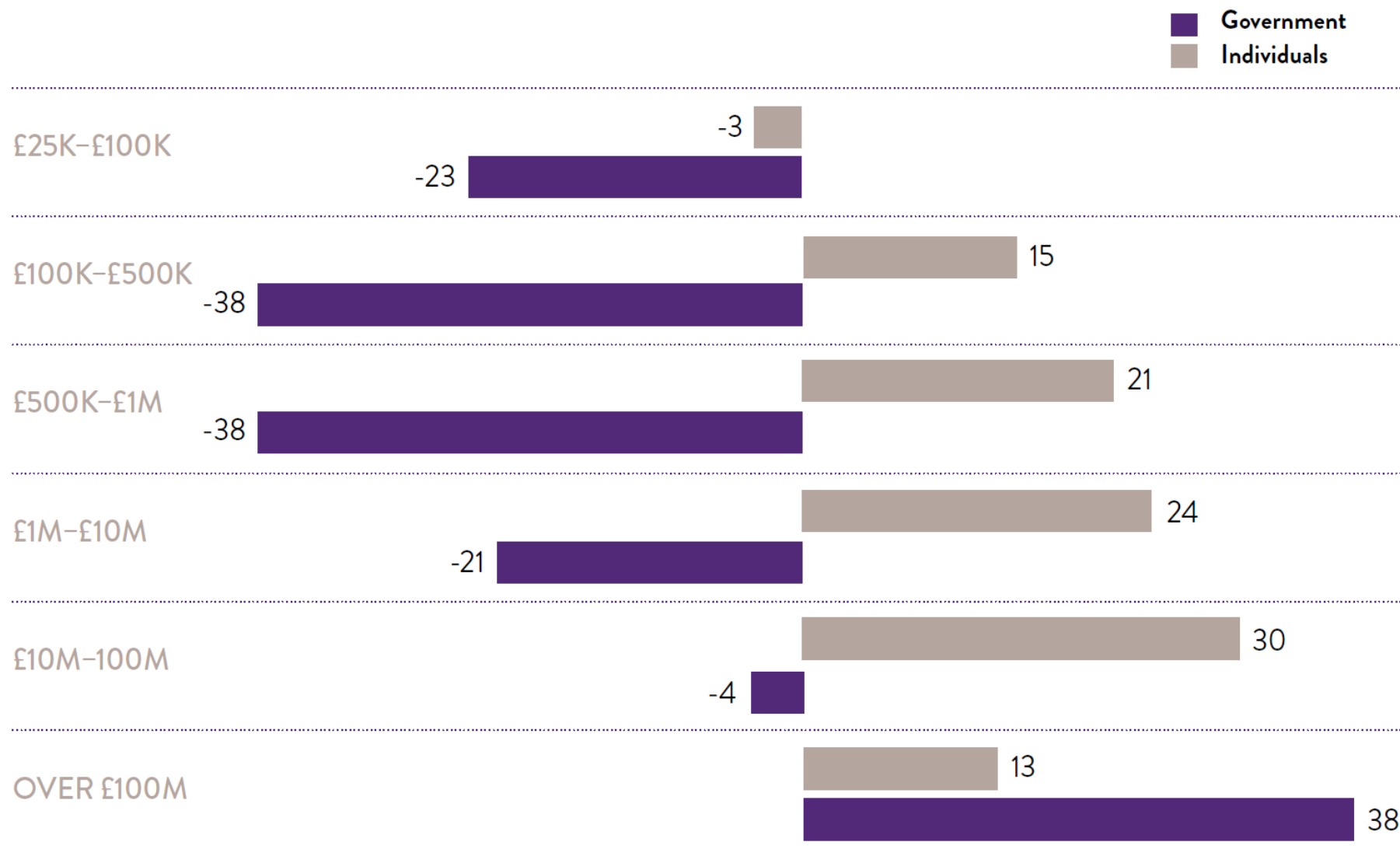
Income mix shift:

Sources of income for charities in the income band £25k-£1m, cumulative change, 2008/09 to 2012/13



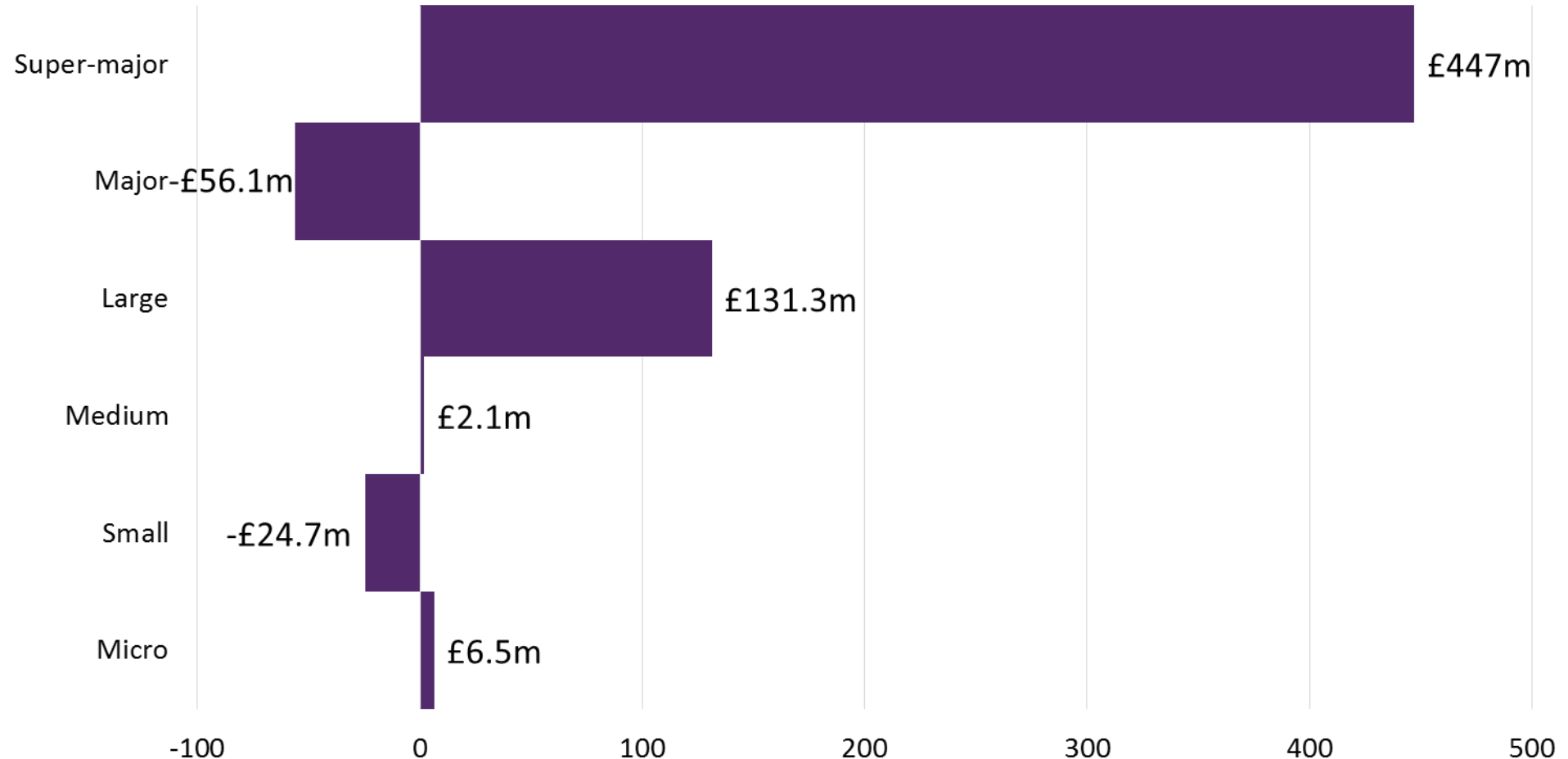
HOW DO THESE TRENDS COMPARE WITH CHARITIES OVER £1M?

More lost from government, less gained from individuals: Change in income from government and individuals (% change)



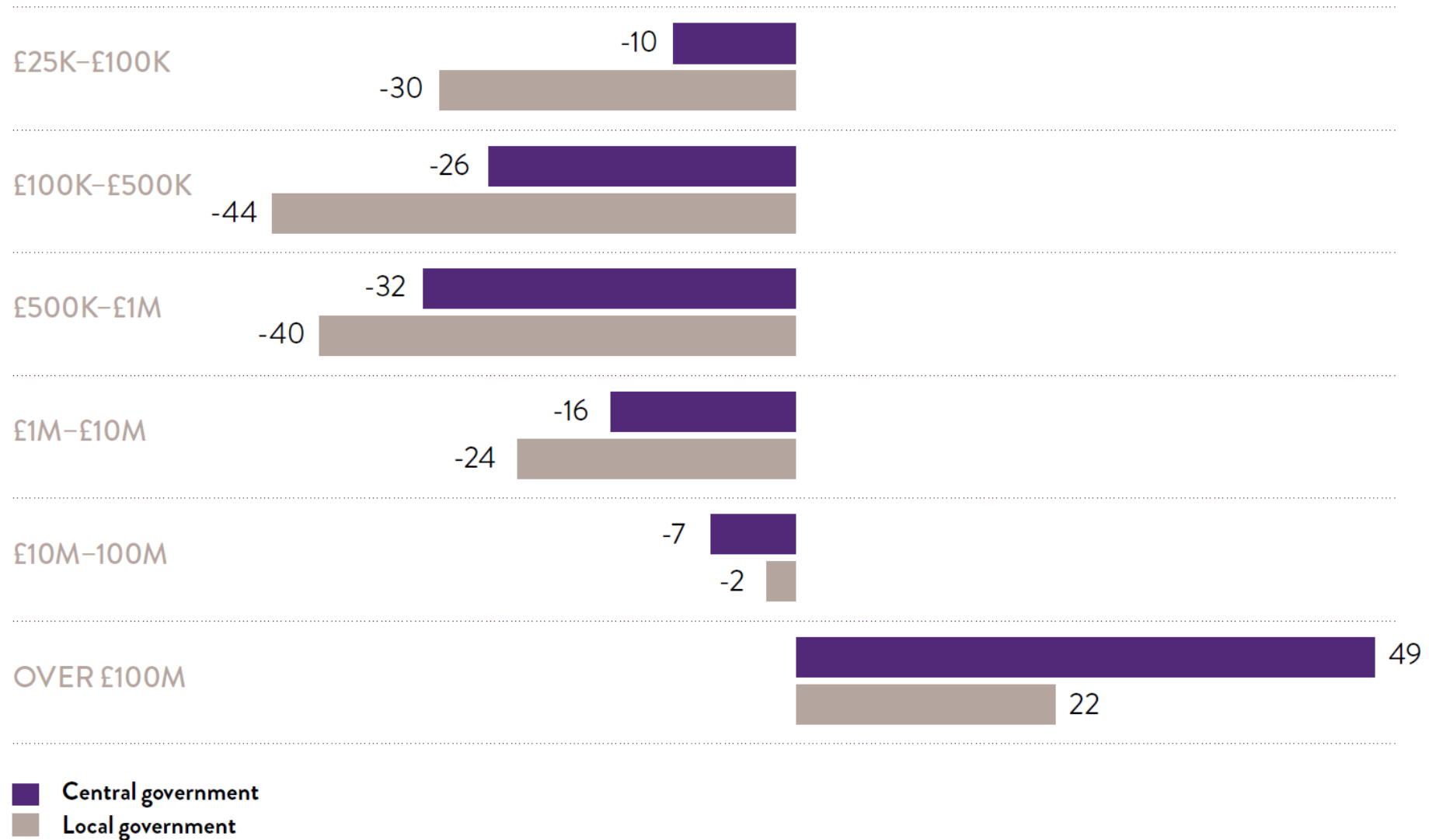
Government income predominantly increased in the super-major category

Change in government income by income band, 2012/13 to 2013/14 (£m, 2013/14 prices)

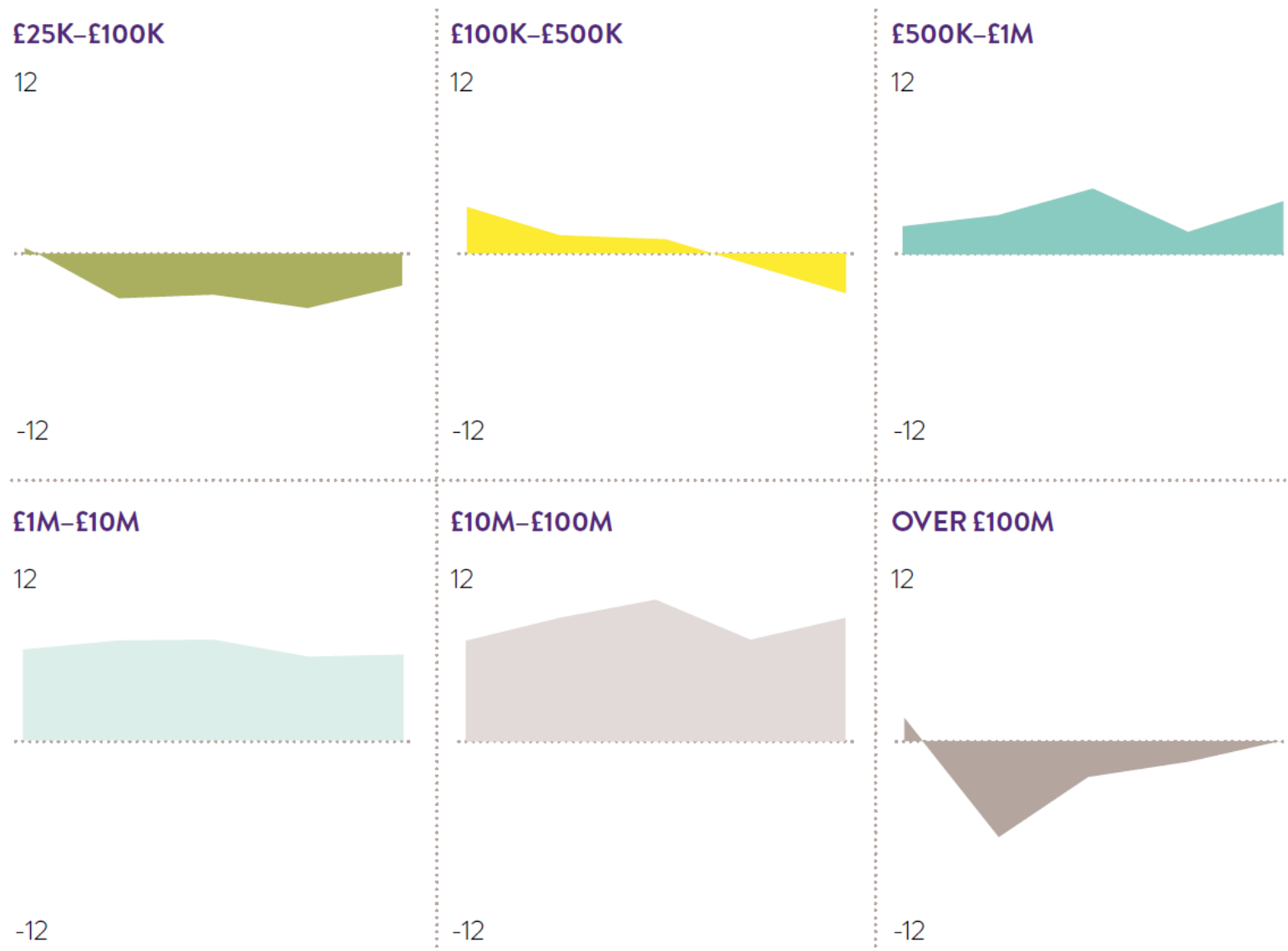


Source: NCVO, Charity Commission

Bigger losses from both central and local government: Change in income from central and local government (% change)

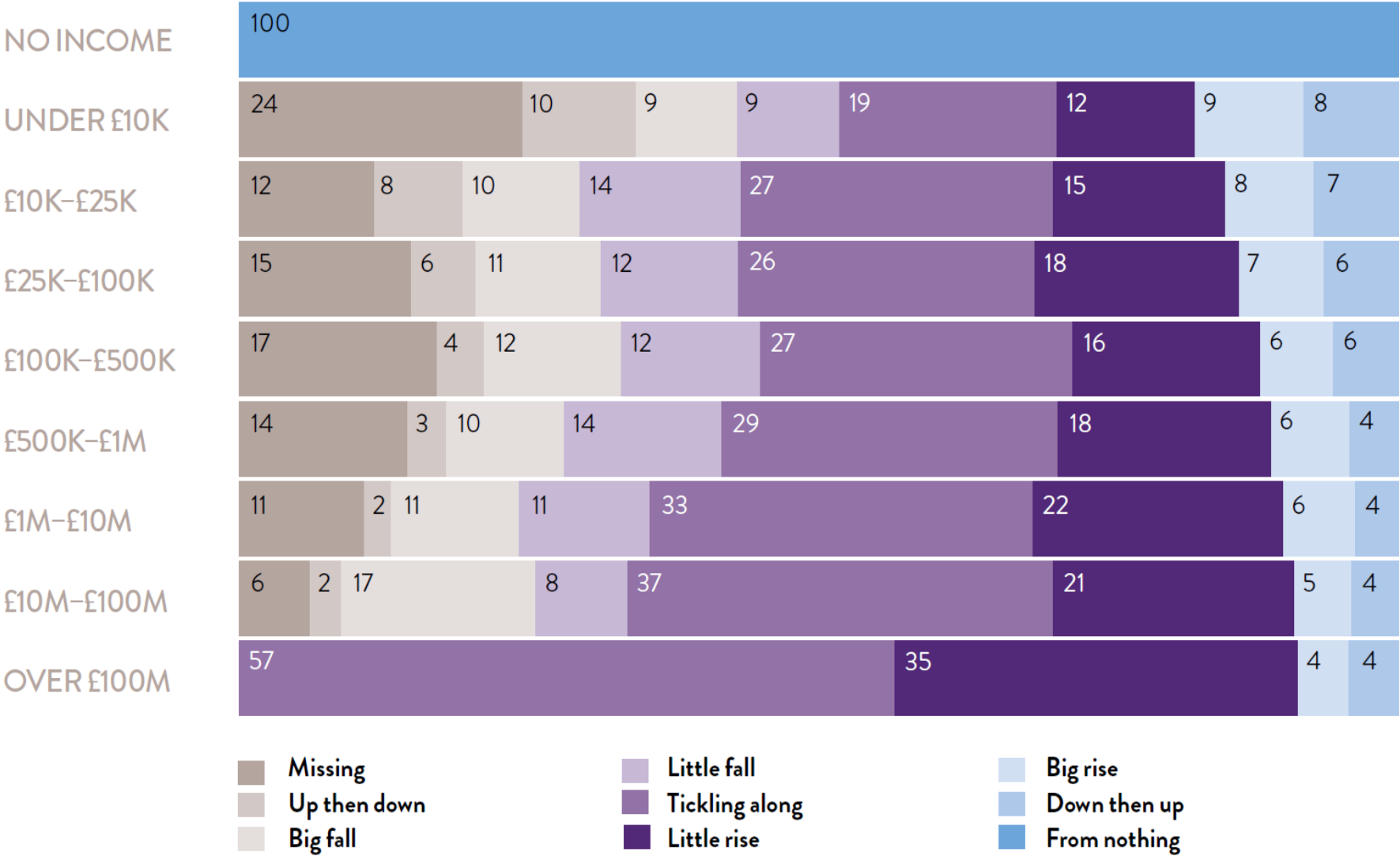


Smaller charities more likely to run a deficit: Annual surplus or deficit as a proportion of annual income , 2008/09 to 2012/13 (%)



A 'TYPOLOGY' OF INCOME TRAJECTORIES OVER TIME

Income of smaller charities is more unstable: Proportion of charities within typology categories (%)

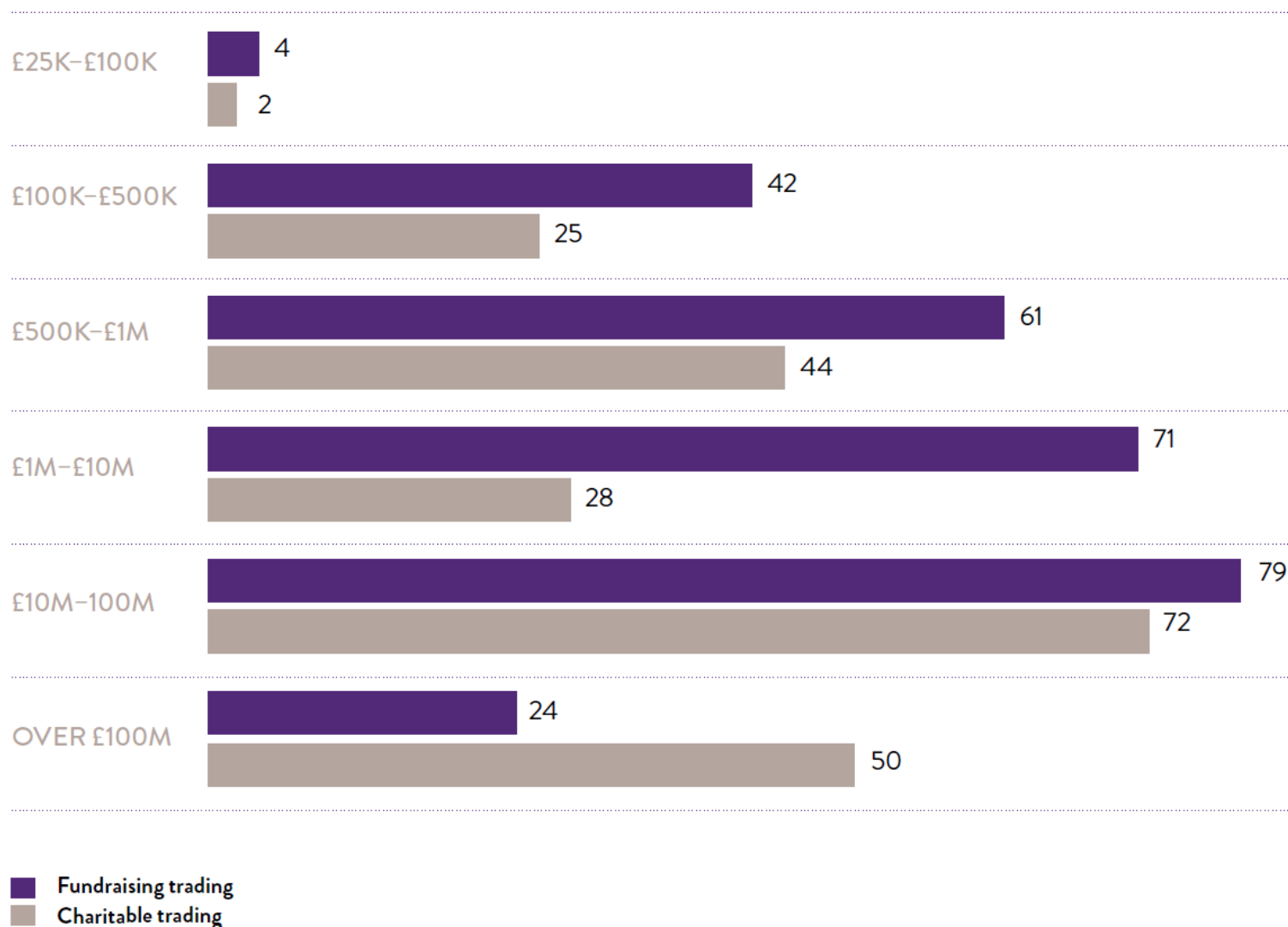


Behind the data: dependence on few resources

- *One mental health charity in south London experienced a ‘big rise’ in income as a result of one successful bid from a local clinical commissioning group.*
- *A heritage trust in the West Midlands experienced a ‘big rise’ in income as a result of a single legacy donation and one successful lottery bid.*
- *A penal reform charity in London experienced fluctuation in income due to the end of a Big Lottery Fund grant which accounted for over 40% of its income.*

HOW ARE SMALL AND MEDIUM-SIZED CHARITIES COPING?

Increase in earned income, particularly fundraising trading: Change in earned income from fundraising trading and charitable trading, 2008/09 to 2012/13 (% change)



Behind the data: increasing earned income

CHARITABLE TRADING

‘Developing partnerships with larger organisations that wish to subcontract our services’.

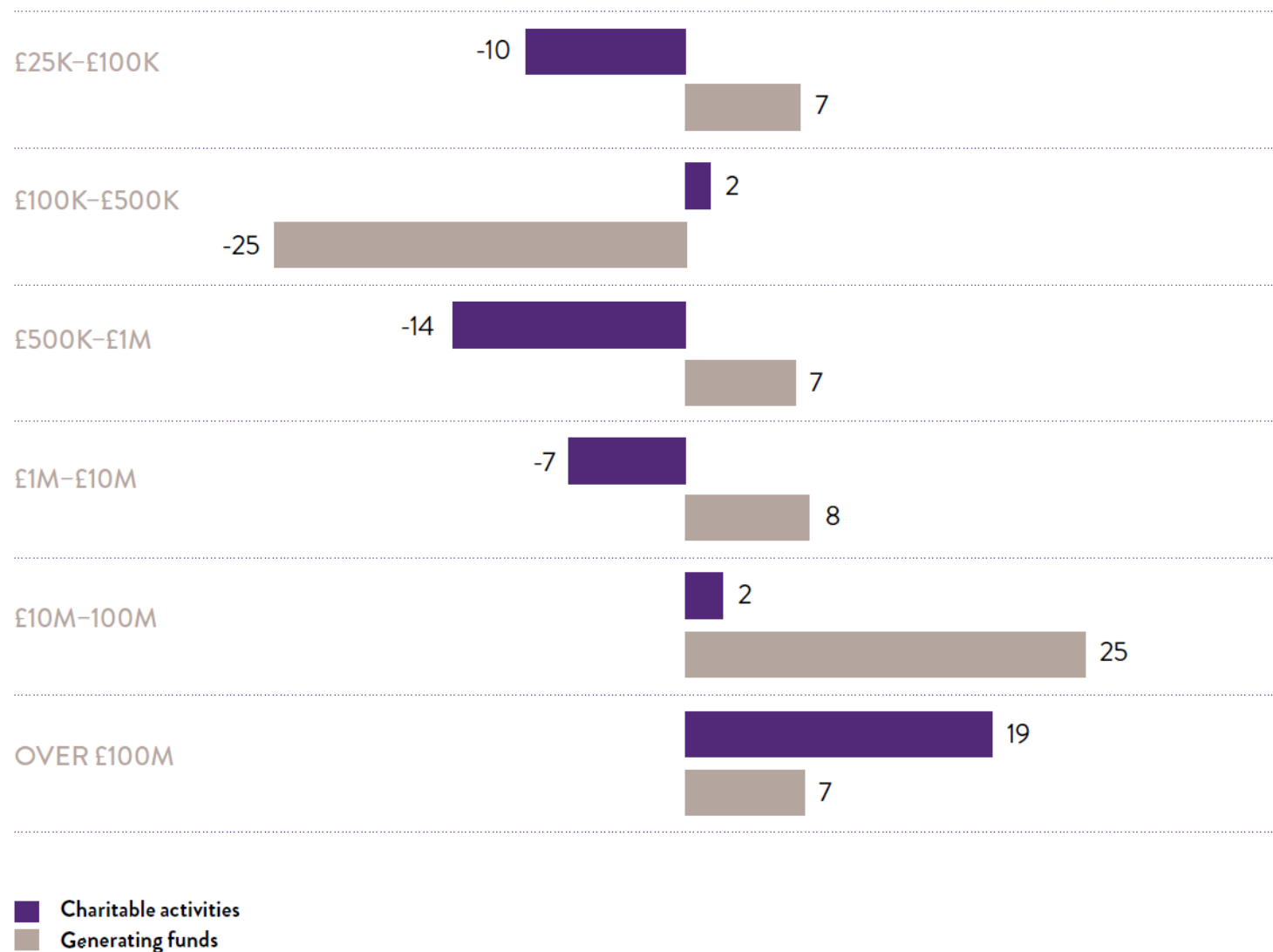
Social Impact Bonds ‘enabled [it] to expand in a climate of public-sector cuts’.

FUNDRAISING TRADING

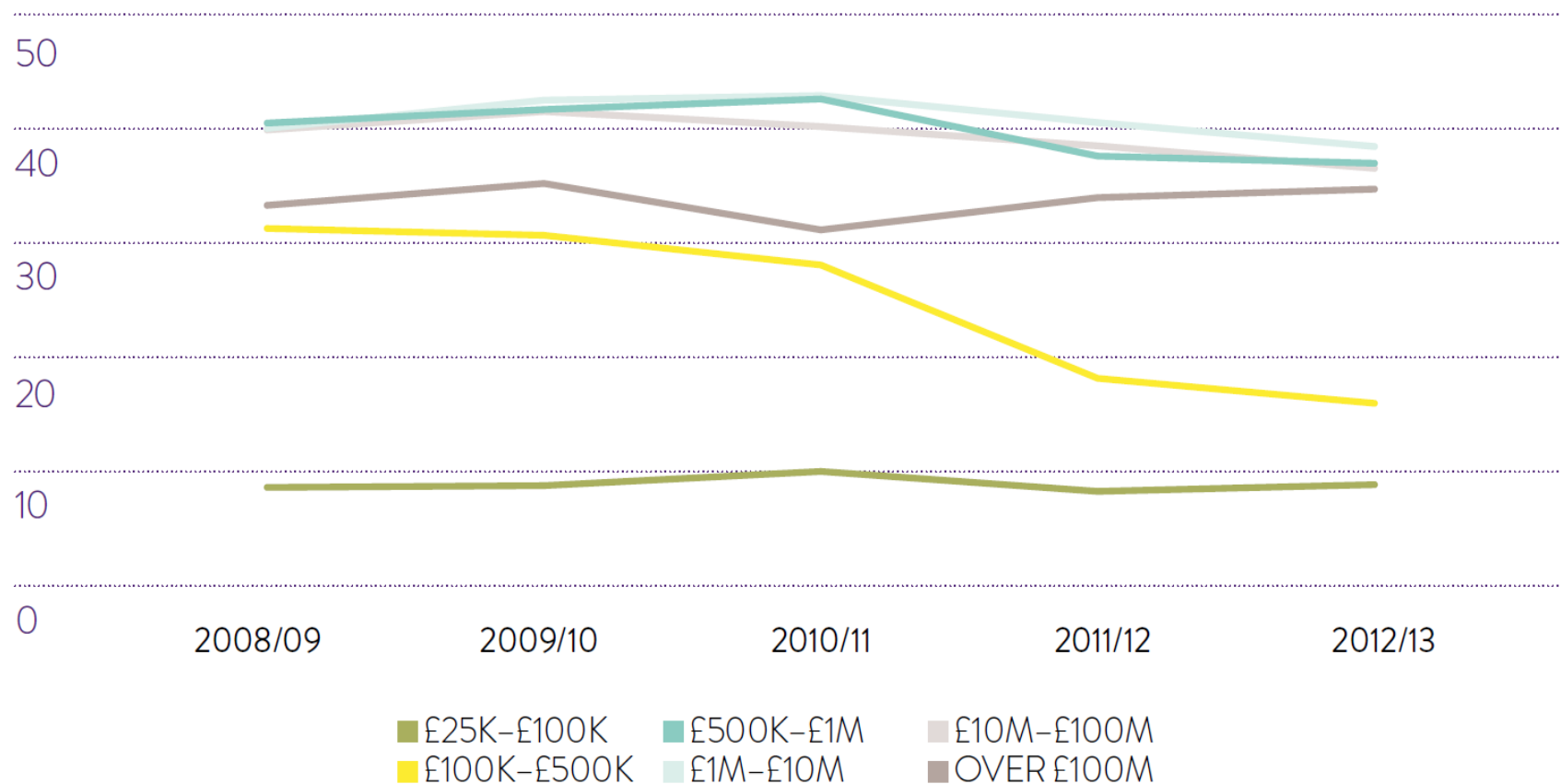
‘the Social Enterprise sector is a key driver in strengthening an inclusive and growing economy’.

‘[we] identified the need to invest in maintaining and establishing constructive and positive relationships with cross sector agencies’ - resulted in securing extra revenue as a subcontractor.

Increased spending on generating funds: Change in proportion of spending on charitable activities and generating funds, 2008/09 to 2012/13 (% change)



Decreased spending on staff costs (£100k-£500k income band): Change in proportion of spending on charitable activities and generating funds, 2008/09 to 2012/13 (% change)



Summary research findings

- Smaller charities experience more ‘churn’, less resilient to volatile funding scenarios.
- Implications for funding environment eg longer-term grant funding?
- Whilst individual charities are weathering the storm and even finding opportunities in the new environment, the overall picture is one where small and medium-sized charities are losing out in comparison to larger organisations.
- Small and medium-sized charities have employed a diverse set of strategies to cope with funding changes but many will require further support.

NCVO champions the voluntary sector and volunteer movement to create a better society.

We connect, represent and support over 12,000 voluntary sector member organisations, from the smallest community groups to the largest charities.

This helps our members and their millions of volunteers make the biggest difference to the causes they believe in.

- Search for NCVO membership
- Visit www.ncvo.org.uk/join
- Email membership@ncvo.org.uk
- jennifer.crees@ncvo.org.uk;
research@ncvo.org.uk
- data.ncvo.org.uk





DORSET CHARITIES CONFERENCE
13TH JUNE 2016, WIMBORNE



KINDLY PRINTED BY:





CharityOffice.org

mark@charityoffice.org

07771 528192



DORSET CHARITIES CONFERENCE
13TH JUNE 2016, WIMBORNE



KINDLY PRINTED BY:

