

# Beyond Tomorrow:

## State of the sector 2016

### Surrey Heath

Our original State of the Sector research in 2013 has now been updated, refocused and expanded upon with the help of over 375 community organisations and stakeholders across Surrey, to help us understand where the voluntary sector is now and where it needs to be in the future.

We hope that this research and associated events will support all those operating within Surrey's VCFS, and its public and private sector partners, to create processes that will enable even better, more efficient and more effective service delivery for the people they serve.

The research gives us an insight into the projected needs of the community in the future, recognising that we need to challenge past and present assumptions, develop innovative solutions and, above all, keep a real focus on the changing needs of the communities in Surrey.

In this report, you will see that the environment in which we operate is getting more harsh and less predictable. A strong VCFS is now needed more than ever. We therefore hope you find the research contained in this report useful, and that it assists your organisation evolve, so that you continue to deliver your vital services effectively.

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# Who, what and where?

## What we are doing

### Top 10 services

1	Information, Advice and Guidance
2	Emotional or Physical Support
3	Education, Research or Training
4	Good Neighbour Scheme
5	Community Buildings
6	Providing Accommodation
7	Advocacy
8	Other Activity
9	Campaigning
10	Grant Making



**Over half of the 375 respondents engage in providing information, advice and guidance to their service users, and nearly half provide emotional or physical support**

**In 2013** of respondents said that they worked with no specific groups.  
**16%**

**In 2016** of respondents said that they worked with no specific groups.  
**49%**



**Different charitable and social purposes**

## Who are we helping?

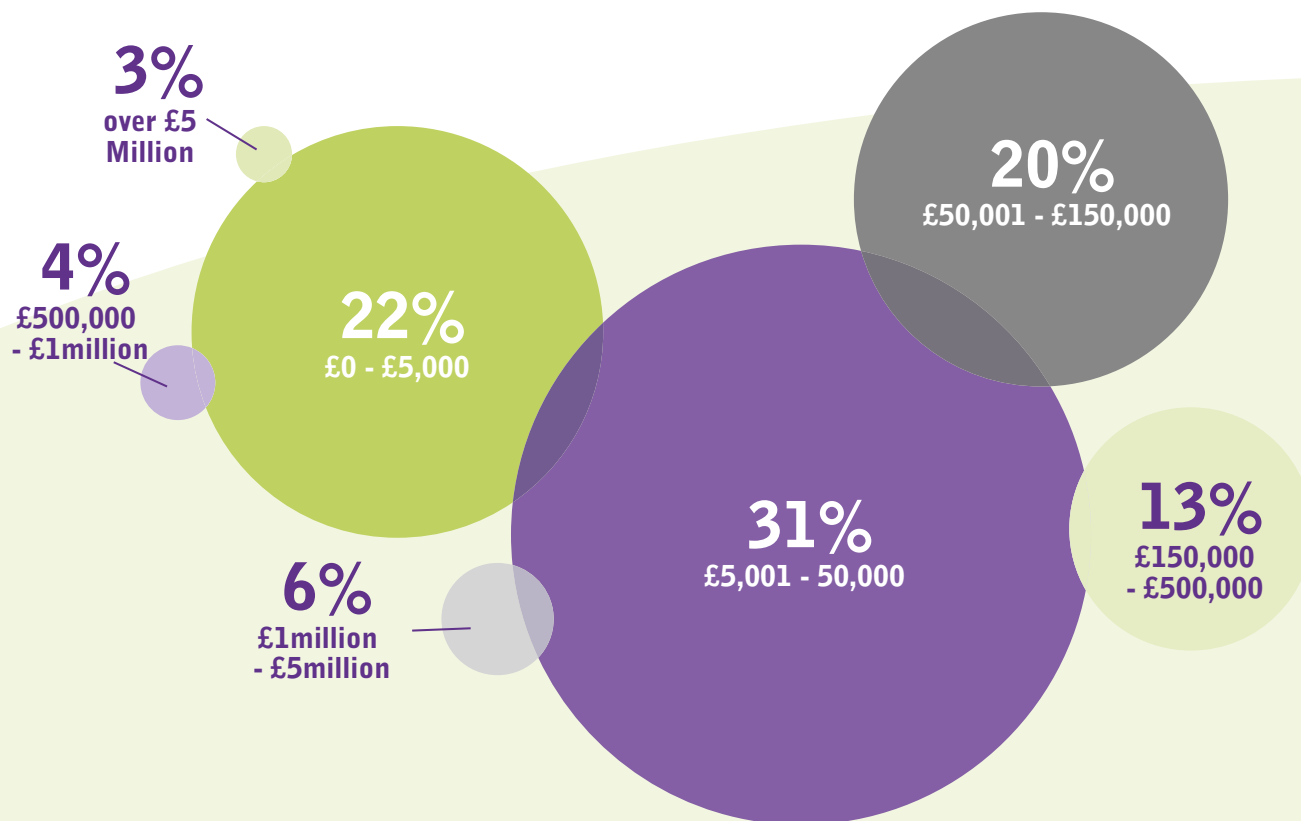
	Top 20 beneficiary groups
1	All people, no specific groups
2	Older People
3	Children 0 - 12
4	People with Disabilities or Special Needs
5	Women
6	Men
7	Young People 13 - 24
8	Families
9	People with Mental Health Challenges
10	People with Learning Difficulties
11	People on Low Income or in Financial Need
12	Unemployed People
13	Black and Minority Ethnic People (including GRT)
14	Carers
15	Offenders, Ex-Offenders and Victims of Crime
16	People with Addiction or Substance Abuse Problems
17	Survivors of Abuse
18	People of Faith
19	Lesbian, Gay, Bisexual or Transgender People
20	Homeless People

# Where we are working



# How are we funded?

## How much is our income?



## Where does our income come from?

### Top income sources

1	Donations and Sponsorship
2	Direct Public Fundraising
3	Sale/hire Of Goods and Services
4	District Or Borough Grant
5	Other Grant
6	County Council Grant
7	Membership Fees/subscriptions
8	Contract
9	Investment Income
10	In Kind Contributions
11	Central Government Grant



**19%** of organisations list **Surrey County Council** as one of their top three funders and **21%** list **District and Borough grants**.

The biggest sources of income for Surrey's VCFS are still:

**Direct public fundraising** **33%**

**Donations & sponsorship** **45%**

# Staff, volunteers and trustees



Volunteers disproportionately more important to smaller organisations

43%

Cannot recruit enough skilled staff

but

92%

Can retain good staff



“Recruiting capable trustees can be hard”

48%

Cannot find enough skilled trustees

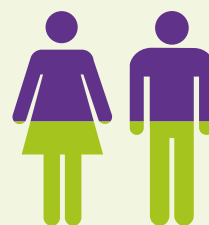


However 88%

of respondents believe that their trustees provide effective support

“We provide ongoing training, support and recognition: We invest in the person”

“There are huge expectations on volunteers now, but they don’t have the skills or the training or the desire to do a lot of what is expected of them”



almost **half** of VCFS organisations struggle to recruit good volunteers



47%

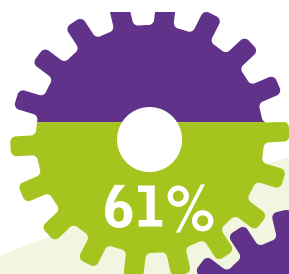
The proportion of younger people (16-25) volunteering has seen a steady increase since 2010, up to 47% in 2014/15.

47%

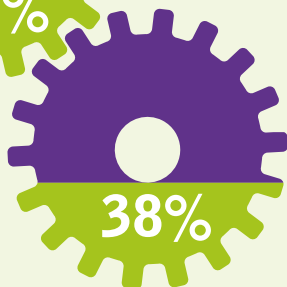
say that they volunteer once a month or more.

# Relationships Outside the Sector

**3 in 4** VCFS organisations work with a statutory body



engage with District and Borough Councils



engage with Surrey County Council

“Due to reduced budgets we are expected to deliver the same services at lower cost”

“The voluntary sector is being used to cover inadequacies in the public sector.”

“They [health bodies] just refer people to us but we don’t get any funding for it”

“There is no silver bullet – it is more intractable than that”



feel valued by statutory partners BUT only 50% say that they are understood and just 39% say they are treated as an equal partner

## Information, Communication and Technology



Only **half** of VCFS organisations make effective use of social media yet 86% organisations use a website.



Almost half of VCFS organisations feel they **do not have the right ICT skills** within their organisation

# The Not-For-Profit Sector of Tomorrow

## Future needs of Surrey from a VCFS perspective

1	Information, Advice and Guidance
2	Emotional or Physical Support
3	Education, Research or Training
4	Good Neighbour Scheme
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“That’s why charities exist - to pick up the pieces”



## Expectations of change



7%

worry that they might have to close in the next three years

Kids Company, “chugging” and aggressive fundraising dented confidence in charity sector.

New structures, processes and focus on trustee responsibilities is following.



## Funding Expectations and Confidence



Nearly **two thirds** of VCFS organisations expect that their expenditure will need to increase **BUT** only **40%** expect their income to increase



believe that funding from statutory sources will decrease

44%

expect to have to tender for more contracts

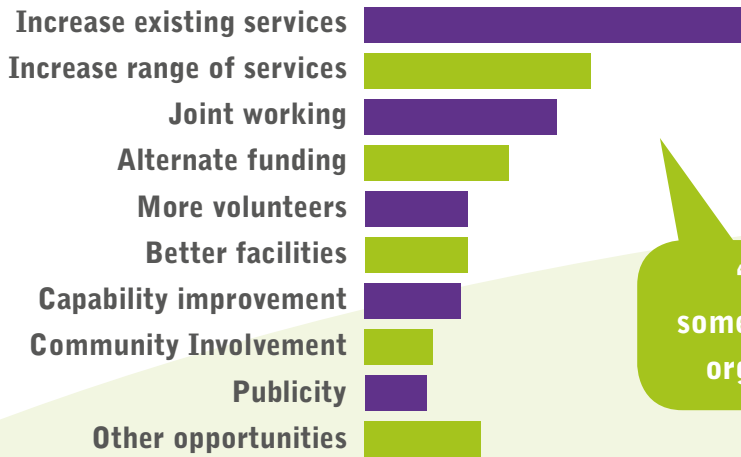


**68%** expect to see the needs of their beneficiaries increase. Only **1%** expect to see a decrease.

**Changes ahead?**  
Streamlining services  
Diversifying income  
Sharing support  
Doing more with less

# Opportunities Available

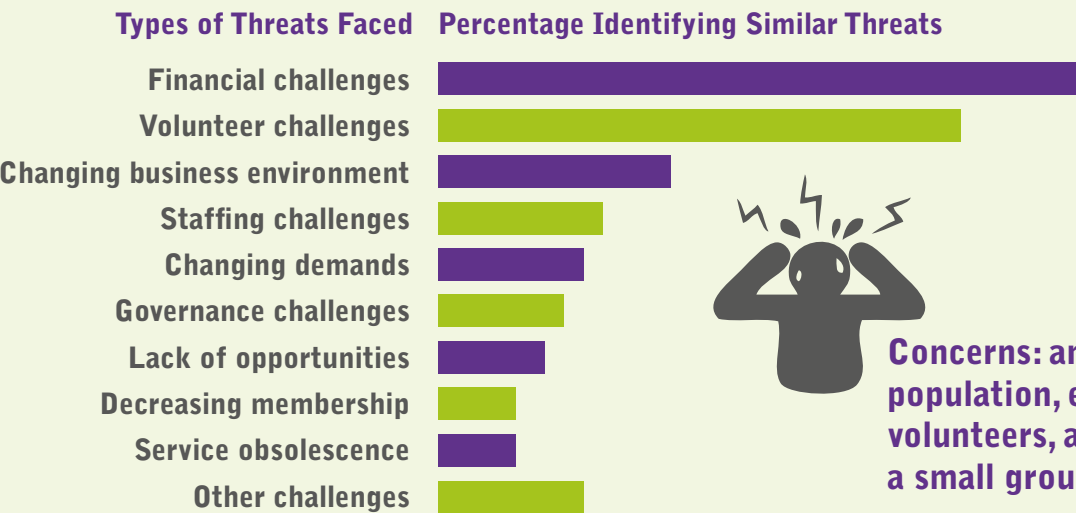
Types of Opportunities Available      Percent Identifying Similar Opportunities



“There is a sense that we are in competition with each other. It’s not a very charitable view!”

“Although it’s hard to say, sometimes a cull of uncompetitive organisations could be better”

# Threats Faced



“Who pays for admin? Overheads? Cost of bidding? Cost recovery model needs to be robust”



Concerns: an ageing volunteer population, exhaustion of existing volunteers, and an overreliance on a small group of volunteers

# Working together



Only one quarter of organisations not currently sharing services are interested in doing so, but half are willing to share external fundraising support.

2/3 are already involved in forums, and most of the others would like to be.

Preference for events bringing VCFS together and online information sharing.

# Training needs

Fundraising and bidding for funds are key staff, trustee and volunteer training needs, plus managing change.

Hands-on learning: workshops preferable to online courses

# Support

Surrey has a strong support infrastructure with lobbying, access to information, consultation and representation being top requirements