SUMMARY OF HAMPSHIRE'S "STATE OF THE VOLUNTARY SECTOR" SURVEY 2017- 2018

An on-line survey was circulated around Hampshire's voluntary and community sector organisations in November/December 2017. A range of questions were posed, most of which were asked in relation to the organisation's position three years ago.

Respondent organisations were divided into 4 broad bands by reported income in the current financial year:

- Micro – up to £20,000
- Small - £20,000 to £100,000
- Medium - £100,000 to £1 million
- Large – Over £1 million

478 responses were received. Almost 50% of respondent organisations were classed as 'micro'.

Action Hampshire
Helping our communities thrive

To download full report, please go to:
actionhampshire.org/hampshire's-state-of-the -voluntary-sector-survey

Demand

Over 60% of respondents report that demand for their services has *increased* over the past 3 years, but many also report that the *type* of demand has changed.

Clients are presenting with complex or multiple issues, and as other services close there is nowhere to refer them on to, so they have to be supported in a more holistic way. Increased numbers of clients appear to be unable to access statutory services, or are being referred by statutory services that are unable to help. Mental health issues are presenting significant challenges – particularly in relation to young people.

Capacity

Almost half (43%) of respondents reported *no change* in capacity, with the remainder split fairly evenly between *increased* and *decreased* capacity. However, this is set against increased demand.

Narrative comments suggest that many of the respondents who did *not* report decreased capacity are however "feeling the cracks forming". This is caused primarily by financial constraints leading to staff reductions, and problems in recruiting and retaining volunteers.

Reserves

Around 50% of medium sized and large organisations reported a *decrease* in their reserves over the period, while around 30% had experienced *no change*.

For many, reserves had dwindled in order to make up income shortfalls. For some organisations, a strategic decision to 'run down' reserves had been taken in order to make them more attractive to funders.

Income

35% of organisations reported *no change* in income *levels* in comparison to three years ago, followed by 29% citing a *decrease* in income, and 25% reporting an *increase* in income.

When examining *sources* of income, the general theme that emerged was grant and contract income had decreased; while individual donations and traded income had increased. Funding from business appeared to be rare.

Recruiting and retaining volunteers

Over 50% of organisations reported that recruitment of volunteers had become *more difficult* over the past 3 years, while 30% felt that volunteer retention had also become *harder*.

Respondents felt that people were less able to commit to regular (not one-off) volunteering, and it was extremely challenging to recruit volunteers for specialised roles. Many respondents also commented that volunteers were now far more likely to have their own support needs – using volunteering as a therapeutic or job seeking activity. Whilst this was broadly welcomed, there was also recognition that this can increase costs and effectively reduce the number of available volunteers.

Many organisations were also concerned that their volunteers were ageing, with few younger people able or willing to replace them. There was a feeling that recruiting and retaining volunteers is skilled and difficult work (that costs significant sums), and this fact is often not recognised by funders.

Financial security

Approximately half of respondent organisations felt that their sense of financial security had *not changed* over the past three years, however 60% and 50% respectively of medium and large organisations felt *less financially secure* than they had three years ago.

Recruitment and morale of paid staff

Very few respondents felt that it had become easier to recruit and retain staff over the past three years. Most felt that it had *stayed the same* or become *harder*. 50% of respondents from large organisations felt that staff morale was now *lower* than three years ago.

Respondents felt that they were unable to offer market rates of pay or job security, due to lower organisational incomes, short term funding, and contract structures. Others felt that the organisation's work had become more complex and risky and voluntary sector pay and conditions were not sufficient compensation to attract staff. Morale is being negatively impacted by a challenging environment, and staff feeling that their work is not valued externally.

What does your organisation struggle with?

Respondents were asked whether they struggled with a range of subjects/issues.

The TOP issues for micro and small organisations were:

- recruiting, retaining and managing volunteers;
- earning our own income;
- marketing our services; and
- bid writing

The TOP issues for medium and large organisations were:

- earning our own income;
- bid writing; and
- tendering and procurement

Planning for the future

Micro and small organisations were most likely to say that their ability to plan for the future was *unchanged* in relation to three years ago. Medium and large organisations were most likely to say that they were now *less able* to plan for the future.

What will your organisation be doing in a year's time?

Few respondents (7%) felt that they would be helping their beneficiaries less in a year's time. Most felt that they would be helping their beneficiaries more (perhaps in a different way) or the same amount. Given the foregoing sections of this report, it does perhaps beg the question of whether some respondents answered aspirationally, rather than in an evidence based way?

A worrying 22% reported that they either had *no idea*, or were unsure if they would *still exist* in a year's time.

Infrastructure (organisational support) Services

73% of respondents reported using the services of one or more of the organisations in the Hampshire CVS network over the past year. Medium and large organisations were somewhat more likely to use the services of infrastructure organisations than micro or small organisations.

Over 87% of respondents said that the services they used had been 'Very useful' or 'Quite useful'.

Beneficiary types

The largest single beneficiary group of respondent organisations was *Older people* (72 organisations), followed by *People with health issues/disabilities* (66 organisations), then a general "*anyone in need"* category (58 organisations).