



Community Action Suffolk

State of the Sector Report 2019



SUFFOLK
Community
Foundation



Suffolk
County Council

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State of the Sector Report 2019

Foreword

We are delighted to publish this report setting out the state of the voluntary, community and social enterprise (VCSE) sector in Suffolk. The research was undertaken in late 2019 and publication of the report has been slightly delayed due to the COVID-19 global pandemic. It is the result of many weeks hard work and our thanks go to all those who took the time to contribute.

The VCSE sector have responded to overcome the significant challenges and changing demands to better support communities during a prolonged period of austerity. With many services cut or depleted, charities and social enterprises have stepped forward to plug the gap, often on significantly reduced budgets. The continued uncertainty posed by Brexit does not help, nor indeed does the current crisis with Covid-19.

However, the VCSE sector is resilient and well versed in responding to challenging situations. We continue to see increasing demand for investment from organisations looking to strengthen their sustainability and enhance their impact.

The research does indicate that although there are considerable pressures on the VCSE sector, overall, it continues as a large, diverse and active movement with considerable social and economic impact across the county. Many organisations are adapting and developing to meet new needs and ensure their own sustainability.

With so much importance and value being placed on the role of communities, the role of the VCSE sector and increasing levels of volunteering, we encourage all partners to consider the opportunities that exist for greater collaboration and partnership working in light of the findings and recommendations contained within this report.

Christine Abraham, Chief Executive, Community Action Suffolk

1. Introduction

This report is intended to provide a comparative picture of the local charitable sector in Suffolk and how it compares to the national charitable picture. It is a 'high flyover' of the local sector covering a number of areas, including two 'deep dives' seeking to show what happens 'under the radar' in a typical local area of the predominantly rural county of Suffolk. We have chosen to look at areas of consistent interest to the sector itself, our partners, funders and investors. We are also seeking to identify issues that we, as a sector in 2020, need to keep track of. These will be drawn out in the conclusion at the end of this report.

This report aims to give greater insight into the significant contribution of the Voluntary, Community and Social Enterprise (VCSE) sector across Suffolk. It will highlight the impact of the sector to enable influence – particularly with regards to policy. This report is also a way of gaining a better understanding of the collaborative value of the sector, and some 'ownership' of this value and the need to support and nurture it. We have the Suffolk VCSE Leaders group, which was formed in 2019, and is providing a forum for VCSE leaders to meet and collaborate. We intend for this report to be disseminated widely and used to inform the partnership working responses of all organisations seeking to work with and through the VCSE sector in Suffolk.

It is crucial to highlight the work that goes on under the radar – the tireless work of community groups, volunteers, paid staff and others in the sector that keep our communities vibrant. This report is designed to raise awareness of the size of the sector and its contribution not just to community life but to that of the economy and support to our public sectors.

Our charitable and wider VCSE organisations, groups, and volunteers across the county work tirelessly to make Suffolk a safe and vibrant place. **However, this year we have found that a concerning number of our VCSE organisations continue to subsidise their annual delivery costs using their reserves. On average, these reserve levels are now approaching the minimum levels that we would expect to see** (equivalent to 3 months unrestricted costs). This is one of the trends that we want to identify and highlight through this report. The implications are that VCSE organisations are running much closer to minimum resource levels due to reduced ability to generate sustainable funding and/or income. There is also an underlying issue with ability and desire to change – the landscape in 2020 is very different from that in 2010 or 2000. But many VCSE organisations hold on to current practice which places them in a poor position to become sustainable or to retain sustainability through new ways of working.

We need to help Suffolk's VCSE organisations to identify alternative ways to be sustainable – this may be new income generation opportunities, examining how best to address funder requirements, partnering and collaboration to enable bidding for larger more complex contracts (outside the skills and service delivery of one organisation on its own), or to facilitate mergers to form larger and more diverse VCSE organisations that can better withstand the challenges of long term sustainability. There is a need for further leadership and facilitation across the sector to share best practice, encourage more effective business planning, and encourage 'stepping out of the comfort zone' to enable opportunities for income generation to be grasped where appropriate. This has begun with the county wide VCSE Leaders group and with work in the West Suffolk Alliance area to develop consortia. Work is also at a very early stage in East Suffolk.

We also need to better identify and harness the sector's contribution to the growth of an inclusive economy across the New Anglia Local Enterprise Partnership (LEP) area – recent DCMS figures (see Appendix 1) identify that the Civil Society sector contributed £16.2b to the UK economy – 0.84% - this is an upward trend and one that we should explore and exploit as a sector.

2. About Us

Community Action Suffolk (CAS) is the 'go to' organisation for VCSE organisations in Suffolk. We exist to ensure the sector is supported, safe and sustainable. We provide (or signpost) whatever is needed behind the scenes to enable this, so the sector can concentrate on doing what it does best – making Suffolk an incredible place in which to live and work.

We work closely with partners from the statutory sector, including Suffolk County Council, Borough and District Councils, Town and Parish Councils, Health and Police. We help our partners communicate and work more effectively with VCSE sector organisations, communities, and volunteers in Suffolk. All these parties have a vital part to play in improving the lives of people in Suffolk. This is recognised by many statutory partners, though working with such diverse groups can be difficult for large statutory organisations. Community Action Suffolk is positioned to support our partners and open communication channels.

3. The VCSE Sector

What do we mean by the VCSE sector?

For this research we have chosen to focus on registered 'not for profit' organisations with charitable purposes. We have also undertaken two 'deep dives' into market towns focusing on registered charities and the wider VCSE cohort of organisations including voluntary organisations, community groups, the community work of faith groups, and those not for profit organisations, and social enterprises where there is a wider accountability to the public via a board of trustees or a membership and profits will be reinvested in their social purpose.

We have used the definition of 'charity' as an organisation with specific purposes defined in law to be charitable – and is exclusively for public benefit.

There are 2931 physically registered charities within the county of Suffolk.

Nb: this number is those that have their official charity registration address in Suffolk, it does not necessarily mean that they all work in Suffolk, and may not capture others who are registered outside of Suffolk but who work in the county.

We have looked at where they work and their asset base. According to CharityBase (which takes its data from the Charity Commission), there are 3195 charities that explicitly state they operate in the county of Suffolk. Of these 3195 charities, 2557 charities both operate in Suffolk and are registered within Suffolk. This also means that a further 638 charities operate within Suffolk whilst being registered outside of the county.

Nb: these figures do not include the national and international charities that provide blanket coverage of the UK and beyond. They only include those that explicitly state Suffolk on their charity registration area of operation.

If we include Charities, Community Interest Companies, Industrial and Provident Societies, Community Benefit organisations and other registered community groups, the total figure for the number of organisations reaches 6,342 as at February 2020. According to the NCVO 2019 Almanac,

“There are an estimated 390,000 civil society¹ organisations. However, this number excludes estimates for informal organisations and groups, ranging between 600,000 and 900,000.”

Suffolk has always been typically average when compared to national figures. If we use the national NCVO calculation ratio on this total of 6,342

¹ NCVO use the term civil society to civil society is used to include a far broader range of organisations from faith groups and sports clubs to co-operatives and housing associations (<https://data.ncvo.org.uk/profile/voluntary-sector-definition/>)

organisations, there should be a range of informal organisations and groups across Suffolk ranging from 9,513 to 14,587 informal organisations and groups working in Suffolk (using a ratio of between 1:1.5-1:2.3). In the deep dive conducted into Framlingham (discussed in detail later), 103 registered VCSE organisations and groups were identified with a further 68 informal organisations and groups that were found through desk top research. This is a ratio of 1:0.66, (i.e. for every 1 registered organisation there is 0.66 unregistered groups) which is not reflective of the NCVO figures.

Companies House data is one source that we have used to identify some charities and social enterprises, and according to Glass.ai² their “data scientists carried out some tests using Companies House data and the results showed that approximately 30% of all UK registered companies have a website”. They excluded organisations that were outside the private sector as they were so poorly represented and insufficient information was available. Excluded sectors included charities and foundations. This could be used as a proxy to say there may be considerably more VCSE organisations (up to 70% of unregistered voluntary and community groups) that may exist in the town that do not have an open web presence, so have not been recorded in this desk top analysis.

4. Income and where it comes from

The Voluntary and Community and Social Enterprise sector pulls in £697million in income to the County of Suffolk – however this large figure hides the real picture. On page 11 we unpick this to show the real income that comes into and is likely to be spent in Suffolk. A further issue that we are seeking to unpick is the impact of this income on the social challenges that affect Suffolk. Data to support this analysis is limited but we have information from the Suffolk Funding Portal on what charities are seeking funding for, and therefore this gives an idea of where charity income is likely to be spent. We look at this on page 20.

In brief, the key aspects of charity income are spent on obvious areas such as employed staff, support for volunteers and issues relating to the sustainability of the charity – so business planning that will enable them to continue with their core activities, costs associated with maintaining buildings, costs associated with maintaining land, and costs associated with maintaining vehicles. That business planning is a top ask is a trend that reflects the need to plan more effectively for future sustainability. The impact of this spend is

² <https://www.glass.ai/glass-news/2019/1/28/a-comparison-of-uk-sectors-based-on-web-presence-and-official-statistics>

on provision of services, community buildings and facilities that enable these services to be delivered near to where people live and work in response to need.

We have looked at where VCSE organisation's money comes from (balance of individuals/government, voluntary/earned/investment, amount +/- over 10-15 years).

In Suffolk (when looking at the 133 larger charities that have an income of £500,000 and over for whom more detailed income analysis is available), 51% of income comes from Charitable Activities, 18% of income comes from other trading and fundraising activities; 27% of income comes from voluntary income – a mix of donations, legacies and grant income, only 3% of income comes from investments and 2% comes from other sources. This low level of income from investments in Suffolk does not reflect the national picture so is possibly an area for further investigation.

According to NCVO in the 2019 Almanac national figures, assets continued to grow mainly as a result of strong investment performance,³ and the “overall growth in income was due to grants and investments, while income from the public and government plateaued... (in their analysis, NCVO confirmed that) other sources of income include money from ...investments (8%)⁴”, so this seems to indicate that the 3% in income from this source in Suffolk is not representative of the national picture.

When it comes to UK shares, according to finder.com, only 1.10% of UK shares are owned by charities, churches, etc., whilst by far the majority of UK shares are owned by people or businesses overseas, at 53.7%... Inward UK FDI (Foreign Direct Investment) fell from £192 billion in 2016 to £92.4 billion in 2017 and Outward FDI totalled £91.4 billion in 2017, the highest amount since 2008, with the overwhelming majority of this outward FDI was into the USA (£88.5 billion)⁵.

According to the Charity Commission Blog⁶, “Charities are driven by a passion to make the world a better place in line with their purpose and values, so it is reasonable to assume that everything a charity does should reflect this. However, in the area of financial investments, some charities have historically – and understandably – focussed on making the best financial return, without taking into consideration all the potential unintended consequences of their investments.

³ <https://data.ncvo.org.uk/sector-finances/>

⁴ <https://data.ncvo.org.uk/sector-finances/income-sources/>

⁵ <https://www.finder.com/uk/investment-statistics>

⁶ <https://charitycommission.blog.gov.uk/2020/01/15/how-do-charities-approach-investing-in-line-with-their-purpose-and-values-we-want-to-know-and-we-want-to-help/>

Trustees have a duty to maximise the financial returns generated from the way in which they invest their charity's assets, but the Commission also encourages them to consider whether their investments are consistent with their charitable aims. As public expectations and attitudes evolve, there are welcome signals that charities are thinking about how to reconcile achieving good returns with responsible investments that align with the charity's mission and purposes."

This leaves the sector with a need to identify routes to investment advice to assist with broadening their income sources whilst still retaining their values. This is possibly another area that the sector in Suffolk could look at to better inform how to source good advice on investment income possibilities.

There is no easy way to get an income analysis across all VCSE organisations in Suffolk, without going into every organisation's accounts and taking the data from the accounts they submit to the Charity Commission. Therefore, we have examined the 133 with income over £500k and a sample of 300 small charities where we could glean information to do an income analysis. This is outlined in more detail later in the income section. The aim of this is to build up a database over time to enable a more informative picture of where smaller charities get their income from over time. Further details of income by organisation size can be found in Figure 14, Appendix 2.

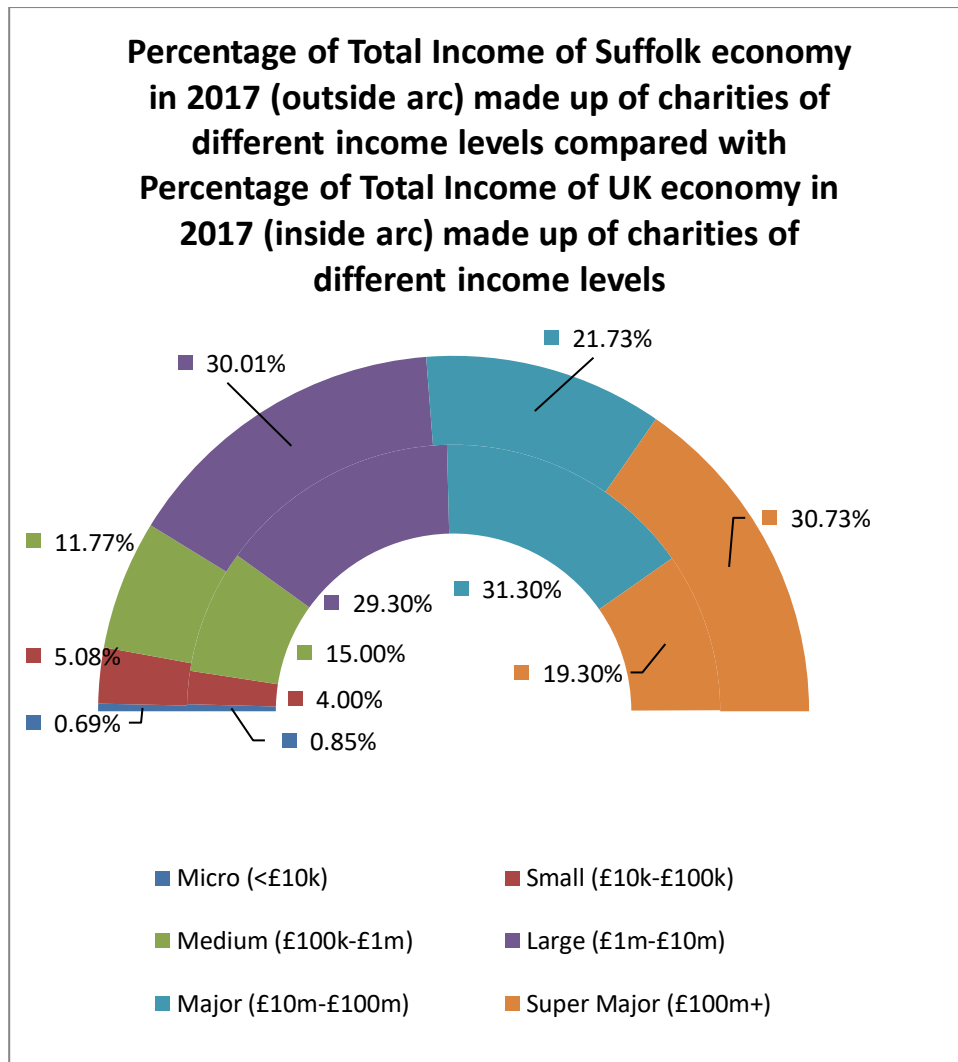


Figure 1 - Percentage of income to UK economy and to Suffolk economy in 2017 from Charity Sector

Total income for Suffolk 2017 was £643,527,777. The super major category netted £197,730,000 of this in 2017. This represents 30.7% of total income to Suffolk charities in 2017.

There is a key issue to be unpicked here – whilst charitable income for Suffolk seems healthy, if we look in more detail we find that 30.7% is lodged in one category, with one organisation who have their national HQ in Suffolk – so any significant spend from that charity is likely to occur nationally and not in Suffolk. If we move to the next ‘major’ category – charities with £10-100m income we find that there are 7 listed – 3 schools, none of which are front line charitable delivery organisations. They are a mix of schools, housing and arts with a large grant giving foundation based in the County with a national reach. They account for another £139.8m of the total charitable income to Suffolk (total £643.5m). The list of ‘super major’, ‘major’ and ‘large’ charities is included in Figure 15, Appendix 2.

The next significant category is 'large' – charities with an income of £1-10m. 59 organisations, of which 35 are not front-line delivery charities, being a mix of education, arts and foreign aid.

If we subtract the income of these 'large' charities (taken from the 'Suffolk total') we are left with charitable income for Suffolk from micro, small and medium charities of £201.5m (31.3% of the total), which is likely to be spent within the county to address some of our key societal challenges. As we can see below, these three charity sizes account for 97.6% of charities in Suffolk. A huge imbalance in terms of income.

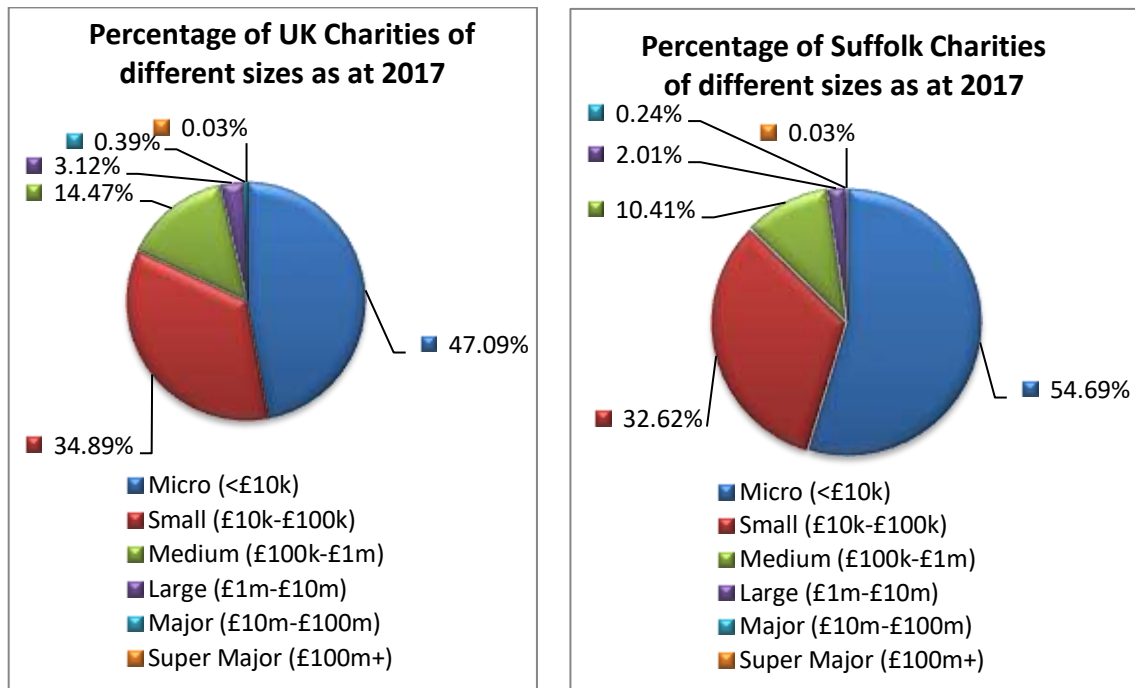


Figure 2 - Percentage of UK and Suffolk charities of different sizes in 2017

Suffolk has more micro charities than the national average at 54.69% and 47.09% respectively. Other charity sizes for Suffolk are more in line with national figures. According to NCVO data, micro charities receive the smallest proportion of their income from government at 15%. With the exception of the super major category, all other sizes receive an average of 33% of their income from Government.

Trends in income nationally:

In the period 2007 – 2017 nationally, the super major size of charity has increased their % of total sector income nationally compared to other charity sizes. Major sized charities have been the biggest losers in this period – dropping 11% of income. At present we suspect that this may be due to commissioning changes but would expect to explore this through a survey of the sector.

Micro charities have lost just over 1% and medium charities just over 3% - however the impact of this relatively small drop is likely to have been felt significantly more by the smaller charities due to their narrow margins, and in many cases, uncertain long term income going forward.

Figure 3 below shows the changes from 2007/08 to 2016/17 in % of charity income by charity size:

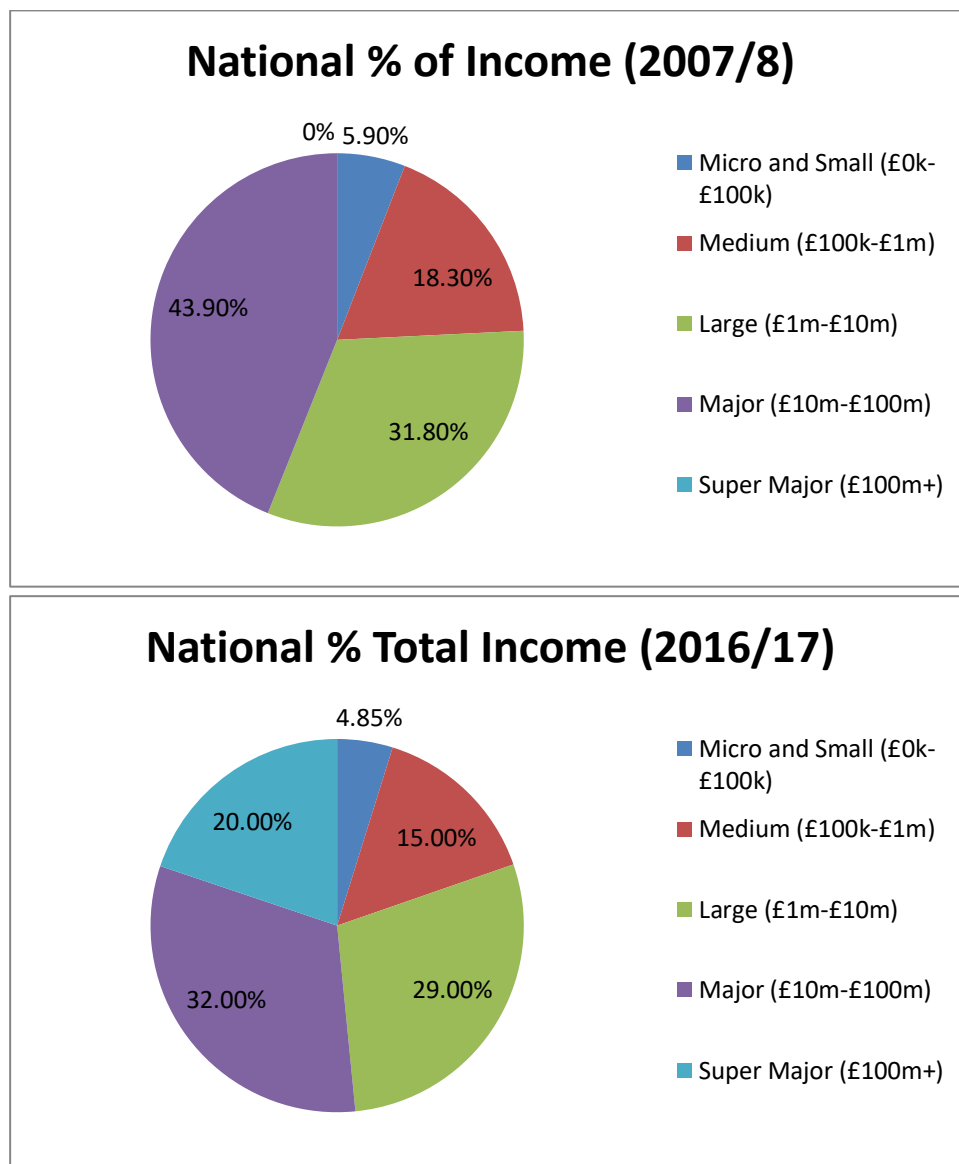


Figure 3 - Percentage of Charitable Income by charity size for 2007/8 and 2016/17 Nationally

The charts in Appendix 3 show the large number of micro and small VCSE organisations nationally and the correspondingly low levels of income in comparison to larger VCSE organisations nationally. This is reflected in the figures for Suffolk below, although Suffolk has a larger number of micro and small VCSE organisations. Smaller organisations often do not have the capacity and resources available to them that larger VCSE organisations do, which makes it difficult for these organisations to adapt to changes such as

reducing public sector funding, and the changing focus of funding towards contracts and tendering. This was reported in the National Audit Office publication – ‘Government Spending with small and medium-sized enterprises’⁷ where “most VCSE’s meet the government’s definition of an SME and so face many of the barriers discussed above. However, the structure and purpose of these organisations creates unique challenges, particularly for charities.”

Contracting and Commissioning at National level:

The National Audit Office Report referred to the recent survey by the Lloyds Bank Foundation (‘Expert Yet Undervalued and on the Front Line’⁸ July 2015) which found that 49% of small and medium-sized charities that bid for public sector contracts described the process as ‘difficult’ or ‘impossible’. As well as the barriers facing SMEs, the VCSE sector has had to adapt to an evolving government funding environment. A decade ago, much of the sector’s funding from government was in the form of grants, but this has changed significantly.

The New Philanthropy Capital ‘Times of Change’⁹ report (April 2015) found that commissioning contracts for charities have grown by £6.5 billion over a decade, while grant funding has shrunk by £2.2 billion. As a result, VCSE organisations may find themselves competing with others to win a contract for a service they previously received a direct grant to run. They may lack the skills, capacity or experience to submit a competitive bid.

The VCSE Focus Group (of the National Audit Office) expressed frustration at the impact that increased contracting has had on the government approach to commissioning services. They told us commissioners develop contract specifications that do not fully understand or reflect user needs and may restrict provider ability to engage the hardest to help. VCSE sector organisations were particularly concerned about short-term contracts which fail to recognise the length of time required to achieve complex outcomes. They also believed the contribution of the sector in some areas can be taken for granted, with the government assuming that charitable organisations will step in, even if not funded to do so.¹⁰ It is also the case that larger bodies such as health alliances find it difficult to contract with a large number of small organisations so the VCSE sector needs to adapt and collaborate to form

⁷ <https://www.nao.org.uk/wp-content/uploads/2016/03/Governments-spending-with-small-and-medium-sizes-enterprises.pdf>

⁸ <https://www.lloydsbankfoundation.org.uk/media/hwmqutzs/expert-yet-undervalued.pdf>

⁹ https://www.thinknpc.org/wp-content/uploads/2018/07/Times-of-change_Public-sector-commissioning-briefing.pdf

¹⁰ <https://www.nao.org.uk/wp-content/uploads/2016/03/Governments-spending-with-small-and-medium-sizes-enterprises.pdf>

consortia to help to secure contracts. This requires additional work and staff time to maintain the same position.

The National vs Suffolk Picture:

NCVO figures nationally identify 160,000 charities all regulated by the Charity Commission, benefitting 125 million people, raising £47.8 billion of income. The sector has a Gross Domestic Product (GDP) triple the size of agriculture (including volunteers). Sector income has increased by up to 50% over 15 years in real terms.

In Suffolk, according to CharityBase there are 3195 charities all regulated by the Charity Commission operating in Suffolk. The 2931 charities registered within the county, have a Sector combined income of £642,879,960. Suffolk sector income has increased by 55% between 2004 and 2017. The balance of the sources of this income – individuals and government – has stayed broadly the same. To enhance our income data, we conducted a ‘deep dive’ into 300 randomly chosen charities in January 2020 to identify sources of income. Of the 300 randomly selected registered charities, 219 do not have a detailed income breakdown in their accounts, therefore the sources of their income has not been included as these details were not available. The random selection shows one of the problems with looking at the VCSE sector, that smaller charities do not have to report in great depth as their income levels do not require this level of scrutiny. The figures in the next paragraph therefore offer a limited but interesting comparison between national and Suffolk figures.

Earned income is identified nationally by NCVO as 52% of the total – a mix of government contracts and individual purchases), in Suffolk the figure was 55.85%. Voluntary income nationally accounted for 41% – a mix of donations, legacies, and grant income, in Suffolk this figure was 39.57%. Nationally 8% of income for charities came from investment returns whilst in Suffolk 4.58% of income came from investment returns. We are not able to establish why this figure is lower than the national average, but this may be an area for further exploration to establish why.

Over the 15 years 2001-16, national voluntary income fell from 50% to 41%, and earned income rose from 39% to 52%. The proportion of money coming to charities from investments was 7% in 2016 (as opposed to 10% in 2001). The private sector and the National Lottery has also reduced over this period. We do not have comparable figures for Suffolk over this period.

In Suffolk (when looking at the 133 larger charities), 51% of income comes from Charitable Activities; 18% of income comes from other trading and fundraising activities; 27% of income comes from voluntary income – a mix of

donations, legacies and grant income; Only 3% of income comes from investments and 2% comes from Other sources.

The picture outlined above explains why charities have had to become more 'business like' in their approach to income generation. This has included developing skills around tendering and bidding for contracts as well as for funding. There are issues with statutory contracts for VCSE organisations however:

- Local authorities little experience of contracting - mistakes
- Tender documents too complicated for size of contract - disproportionate
- Commissioning too rushed
- Local charities no experience of tendering
- Cheapest/bad value bids winning
- National charities/PLCs outbidding/ processing local charities

(Source: Understanding the Voluntary Sector - Ian Bruce NCVO Sept 2018)

The National Audit Office report (March 2016) on Government spending with small and medium-sized enterprises acknowledged that "VCSEs can offer additional benefits where their social or charitable objectives align with government's objectives. For example, VCSEs are more likely to employ disadvantaged people". A recent report (Social Enterprise UK, Leading the World in Social Enterprise¹¹, 2015), found that 59% of social enterprises employ at least one person who is considered disadvantaged in the labour market, such as the long-term unemployed or ex-offenders.¹² Whilst in the same report under Barriers for VCSEs, the report points out that "most VCSEs meet the government's definition of an SME and so face many of the barriers discussed above. However, the structure and purposes of these organisations create unique challenges, particularly for charities. A recent survey by the Lloyds Bank Foundation found that 49% of small and medium-sized charities that bid for public sector contracts described the process as 'difficult' or 'impossible'.¹³

The Suffolk Picture:

We have sought to show the percentage of income received by charity size to show the balance of income between large and small as compared to

¹¹ <https://www.socialenterprise.org.uk/policy-and-research-reports/leading-the-world-in-social-enterprise-2015/>

¹² <https://www.nao.org.uk/wp-content/uploads/2016/03/Governments-spending-with-small-and-medium-sizes-enterprises.pdf>

¹³ *ibid.*

numbers of large and small charities. Actual figures are available in Appendix 5. Percentages of income by size below:

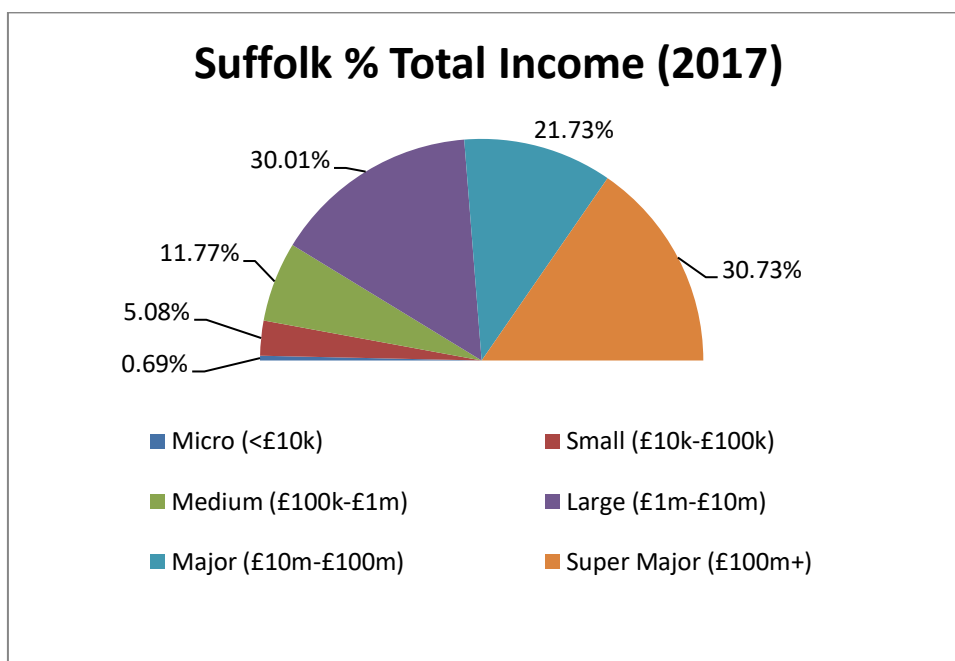


Figure 4 - Suffolk % Total Income 2017 by charity size

It can be seen that over 82% of income goes to the large, major and super major charities in Suffolk. These make up 2.3% of the total registered charities in Suffolk in terms of size. This is reflected in the figures for the 133 charities registered with the Charities Commission in Suffolk below.

It has not been possible to interrogate this breakdown further in terms of income sources.

Looking at the 2017 year-end figures submitted to the Charity Commission, 1032 organisations had a deficit at the year end, whilst 1507 organisations reported a surplus at their year-end. This means that many of our charities have a 'hand to mouth' existence that is reflected in the services that charities seek from support organisations such as Community Action Suffolk. Many report that they 'don't have time to plan for the future' as they are too focussed on ensuring that they have funding now to continue with their services. This leads to missed opportunities to secure longer term support through partnering, and to 'chasing' funding that may not be the best option. This is understandable but will need to change going forward as funding continues to become scarce, and more focussed on outcomes. The need to develop partnerships and shared approaches to bidding for contracts will cause many difficulties.

This pressure to generate funding is shown when we look at the Charity Commission data in more detail by size of organisation. It shows that 37.7% of micro, 38.5% of small and 38% of medium charities have a deficit at year end 2017. However whilst 60% of small and medium charities show a surplus at year end 2017, only 51% of micro charities show a surplus – demonstrating the pressure on small, often inadequately resourced, charities to find funding on top of ‘the day job’. Unsurprisingly major charities in Suffolk fare the best with 28.5% having a deficit but 71.4% showing a surplus at year end. Figure 5 shows this clearly. Figure 23, Appendix 5 includes the actual data for reference. This data demonstrates the need for continued action to support and strengthen the micro part of the sector to enable it to develop more sustainable operating practices that will ensure its role in supporting the community in Suffolk.

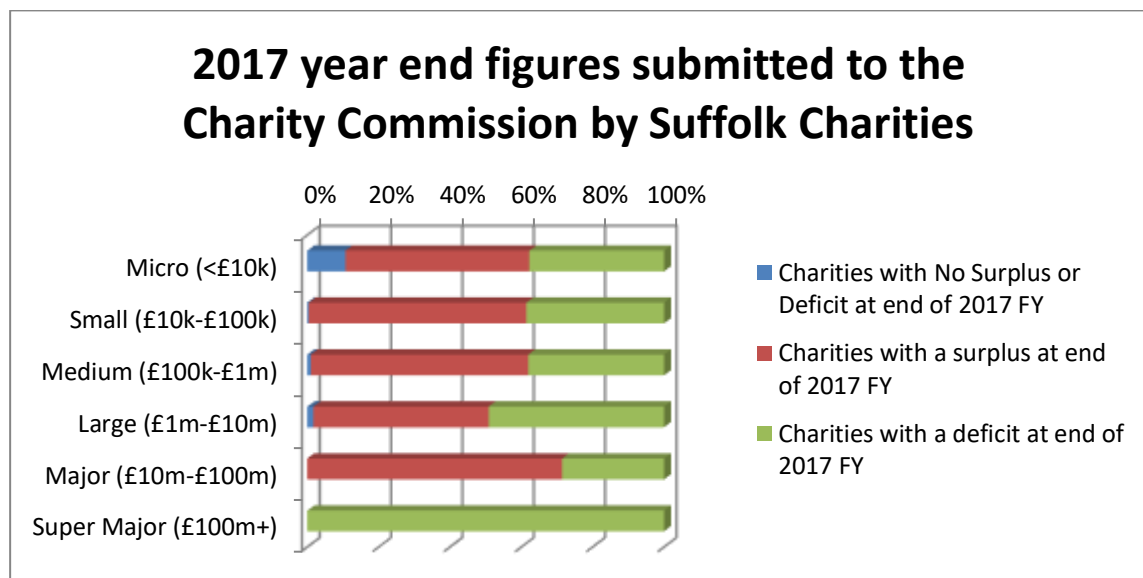


Figure 5 - Charitable Surplus and Deficit for Suffolk Charities 2017

When downloading the Charity commission data, there are 133 charities which have an income of over £500,000 in Suffolk, and this means that the Charity Commission provide slightly more details on the finances and breakdown of income from these 133 charities.

For these 133 charities, the breakdowns were as follows.

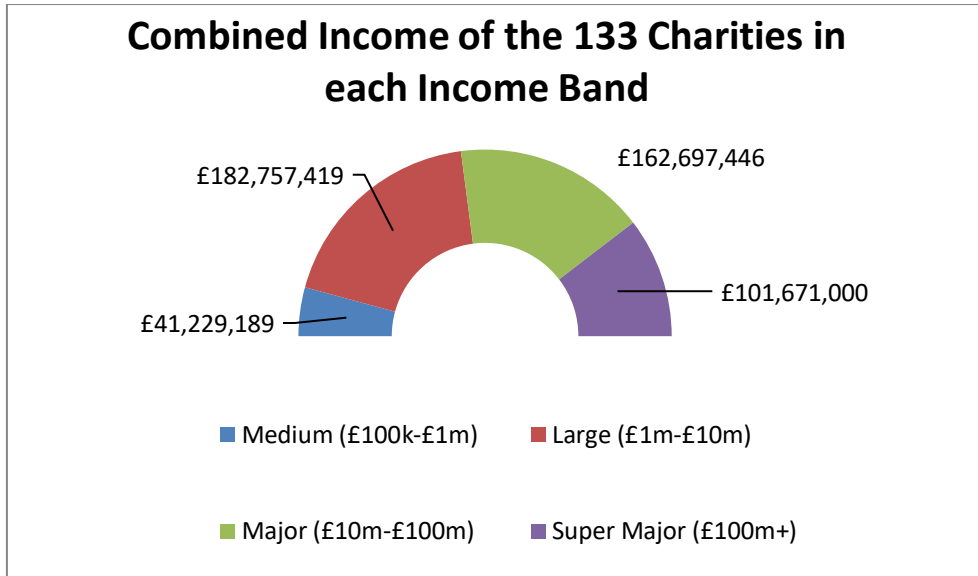


Figure 6 - 133 Charities with >£500k income by size

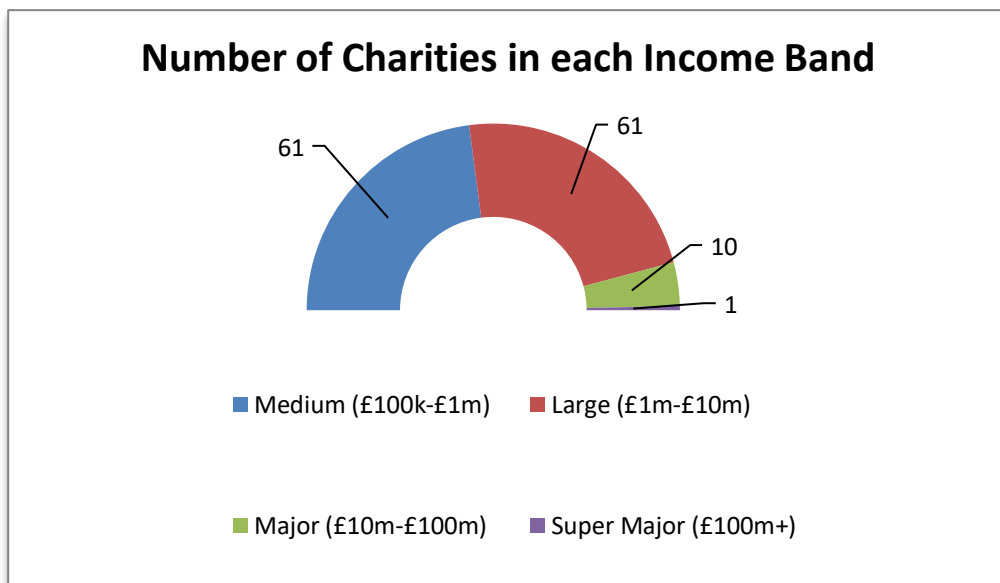


Figure 7 - 133 Charities with >£500k income – number in each size band

The comparison chart above for the 133 charities who receive over £500k income each year shows the sharp disparity between the numbers of medium sized charities and the combined income that they receive compared to the large charities – both have 61 organisations but medium sized charities receive approx. £41m and the large receive approx. £182m. For further details on income figures please see Appendix 6.

It is useful to look at sources of income for the 133 charities who provide information to the Charities Commission – this is shown in Figure 8 below, with actual figures shown in Figure 26, Appendix 6. The majority of income comes from charitable activities – this is defined by the Charity Commission as ‘the proportion of a charity’s total income that goes on things that are directly helping it to fulfil its purpose’. The next largest source of income is from ‘donations, legacies and grants.’ ‘Income from other trading and fundraising activities’ is third on the list but is growing nationally in comparison to the first two categories so we would expect this to be reflected as a trend in Suffolk.

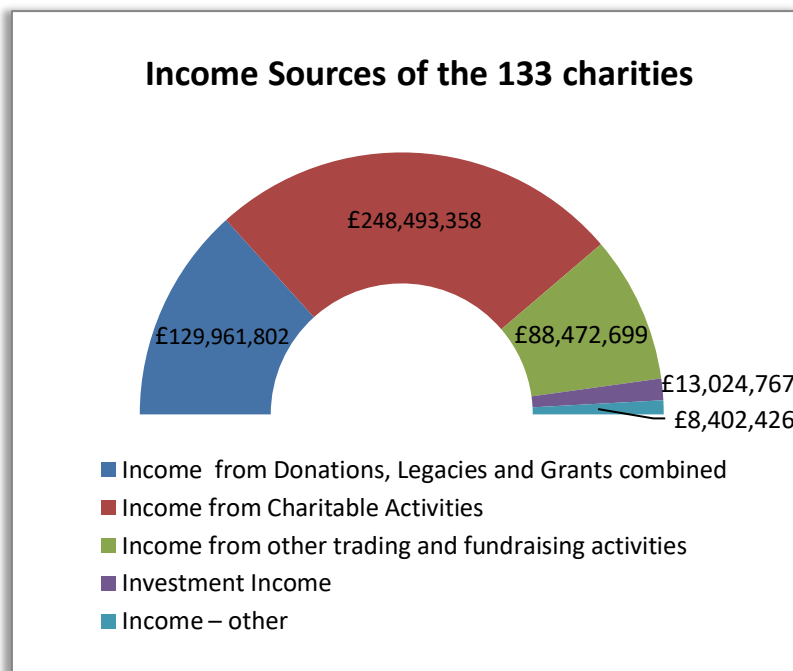


Figure 8 - Sources of income for 133 charities with income >£500k

Funding for charities in Suffolk – how do they find out about it?

In 2016 a Funding Portal for Suffolk was developed supported by Transformation Challenge Award (TCA) funding for year 1. Funding for a further 3 years 2017-20 has been agreed with a contribution from every District and Borough Council and SCC. The portal is administered and managed by CAS as part of our core work.

The funding portal has changed the way that many Suffolk organisations undertake fundraising activity. Groups are now able to autonomously search and identify the funding that they are eligible for. Groups access documents and online support and there is a mix of officer and specialist accompanying support.

Since May 2016 until December 2019, 23,999 visits have been made to the portal with approx. 3,934 unique funding searches. In 2019, 5,085 funds have been viewed (similar to 2018), with 660 unique funds viewed (also similar to 2018), however the number of unique viewers has increased by 26.2% to 371. Feedback from users indicates that 77% found the portal useful and that 52% went on to bid for funding.

The top 5 types of organisations using the portal are Charitable Incorporated Organisations, Charitable Trusts or Foundations, Community Associations or groups, Community Interest Companies and Community or Parish Councils. The areas of work included community, disability, education/training, environmental and animal protection, and equal opportunities.

What were users seeking? Business planning and development, conducting research (into funding), costs associated with maintaining buildings, costs associated with maintaining land, and costs associated with maintaining vehicles. That business planning is a top ask is a trend that reflects the need to plan more effectively for future sustainability. The other 'asks' are not surprising and are traditional fund seeking areas of interest.

The portal asks for feedback on successes - responses to feedback requests are less than 6% of users. The feedback survey to identify successes shows that (in the period covering 12 months up to 10 February 2020) the total funding secured was £468,993.00. This is therefore likely to grossly underestimate the amount of funding that has been leveraged into the County.

Restricted, unrestricted funds and reserves:

Many charities carry large unrestricted funds – this is usually to cover things such as redundancy and other liabilities, as well as any other purpose that the trustees think fit in line with their governance. Figure 9 below shows the amount of funds held in endowments, restricted funds (held for a particular purpose – grant funding for a project for instance) and unrestricted funds. Among the 133 under discussion here, 58.58% is held in unrestricted reserves, with 11.98% held in restricted funds, and 29.44% held in endowments. The amount needed to be held in unrestricted funds varies between charities – a point acknowledged by the Charities Commission. NCVO recently identified that UK charities had £49b in reserves – equating to approx. 15 months of operation – so the scale of reserves may sound high, but operational costs are also high meaning that larger reserves of unrestricted funding may be necessary.

Figure 9 – 133 Charities with income >£500k – Reserve Balances:

Funds (across the 133 charities)	Amount
Endowment Fund balances at end of FY	£294,438,454
Restricted Fund balances at end of FY	£119,891,702
Unrestricted Fund Balances at end of FY	£585,986,526
Total Fund Balances at end of FY	£1,000,316,682

More widely in Suffolk there is also an issue for some charities with managing their reserves – recent evidence from Suffolk (VCSE Impact Survey 2020) shows that over 30% do not have a reserves policy in place – but 65% do highlighting there may be opportunities to share best practice to raise this figure. There are also bigger issues around business continuity planning – only 26% have a business continuity plan – so when there are swift changes of policy at national level from Government or funders, or a national emergency, VCSE organisations are starting without anything to address the issues that may arise from it.

5. Volunteering in Suffolk

Across the 133 charities that have an income of over £500,000, there are 1135 Trustees, 9852 employees and 27,360 volunteers. Appendix 7 shows the figures and balance between them. Figure 10 below shows the human resources balance of people across the 133 charities with income of >£500k in Suffolk:

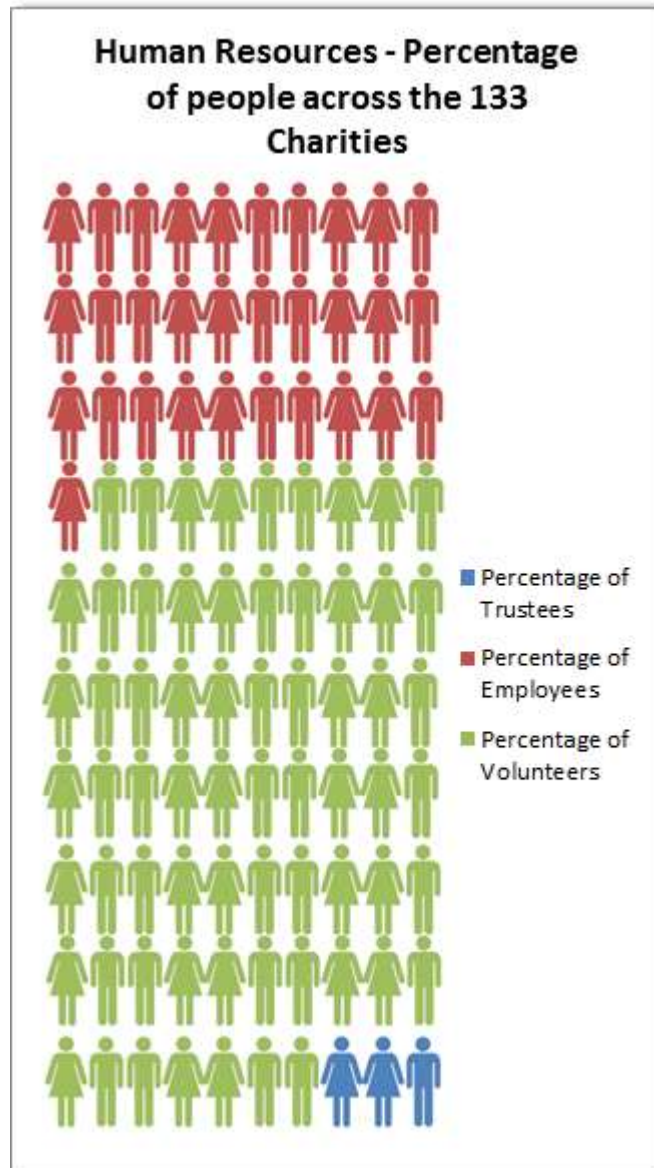


Figure 10 - Human Resources in the 133 Charities with income >£500k in Suffolk

According to the NCVO Almanac 2019, at a national level, nearly four in ten (38%) people volunteered formally (i.e. with a group, club, or organisation) at least once in 2017/18. This gives an estimate of 20.1 million people who formally volunteered during that year.

Over one in five (22%) people formally volunteered regularly (at least once a month) in that year (11.9 million people).

Informal volunteering includes a wider range of activities and is defined as giving unpaid help to someone who is not a relative. In 2017/18, 53% of people informally volunteered at least once, and 27% of people took part in informal volunteering regularly.

If we extrapolate these percentages as an example in relation to the population of Suffolk, this indicates that 288,251 people volunteered formally in Suffolk (i.e. with a group, club or organisation) at least once in 2017/2018. 166,882 people in Suffolk would have formally volunteered regularly (at least once a month) in that year. Informal volunteering in Suffolk in 2017/18, would have seen 402,035 people informally volunteering at least once, and 204,810 people volunteering informally on a regular basis. Appendix 7 (Figure 29) contains a 'volunteer time calculator' to enable a monetary value to be attributed to it. It is useful to show the value compared to other activities that are undertaken.

As part of Community Action Suffolk's VCSE Network Scheme, VCSE organisations in Suffolk sign up to join the Network and have the option of saying how many staff (full and part time) they have, how many trustees and how many volunteers they have. Within this data, 1072 charities and voluntary sector organisations located within Suffolk indicated that they have volunteers. Between them they have 37,407 volunteers. They have 6270 Trustees, 5973 part time staff and 19,822 full time staff. These figures can only be taken anecdotally, as the figures may include statistics from outside of the county. The organisations that had obviously reported national figures have been removed, but it cannot be guaranteed that all organisations counted only those staff and volunteers that work within the county.

DCMS concur with the difficulty in estimating volunteering levels, stating "that Volunteering is a key element of the Civil Society sector". Volunteering is part of the informal economy and this is not captured in the ONS's methodology for calculating GVA (Gross Value Added), which also affects other unpaid home production such as child and adult care. Any overlaps between other DCMS Sectors and volunteering cannot be calculated. As estimated in the ONS published Household Satellite Account, volunteering contributed £24bn in 2016 (this includes only formal volunteering activities). ONS is expected to release the 2018 estimate for volunteering later in 2020.¹⁴

Volunteering opportunities:

Since 2018, 1131 volunteering opportunities have been advertised on Volunteer Suffolk, advertised by 119 host organisations. VCSE Organisations advertising Volunteer Role Availability (not by hours, but by morning, afternoon, and evening) show that the majority of volunteering opportunities are during the day, with fewer at weekends. Figure 30, Appendix 7 shows

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https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/863632/DCMS_Sectors_Economic_Estimates_GVA_2018.pdf

more detail of times and numbers of volunteer opportunities. This may present some problems as many people who wish to volunteer may also work during the day thus limiting the pool of potential volunteers. It may also shape the type of people who volunteer – older retired people, or those in senior positions or who run their own business/charity and are able to manage their own diaries to accommodate day time volunteering, including trustee roles. With trustee roles many larger charities have meetings during the day, while smaller local charities, e.g. Village Hall Committees, meet in the evening and therefore show a greater diversity of committee membership.

Marketing to attract volunteers will need to recognise this and adapt accordingly. Since 2018 there have been 1781 applications made by potential volunteers through Volunteer Suffolk. Figure 11 below also shows that there may be issues with time to manage recruitment as numbers in recruitment are less than those applying – implying that something may be amiss in the process – possibly time for VCSE organisations to actively manage the recruitment process and respond quickly enough.

Figure 11 - Volunteering Status:

Stage of Volunteering Role Applicant	Number of Applicants
Actively volunteering	48
Applied for an opportunity	1335
Currently in recruitment process	179
Not recruited	119
Unable to contact	100

Source: Volunteer Suffolk

6. Those registered as something else – Legal structures to consider

Within Suffolk there are many organisations that are registered as ‘something else’. This makes the Suffolk VCSE sector very complex and increases the need to have flexible support that can be continuously adapted to the needs and requirements of the sector. Figure 12 below shows this graphically and identifies clearly the most common types of ‘other legal structures’.

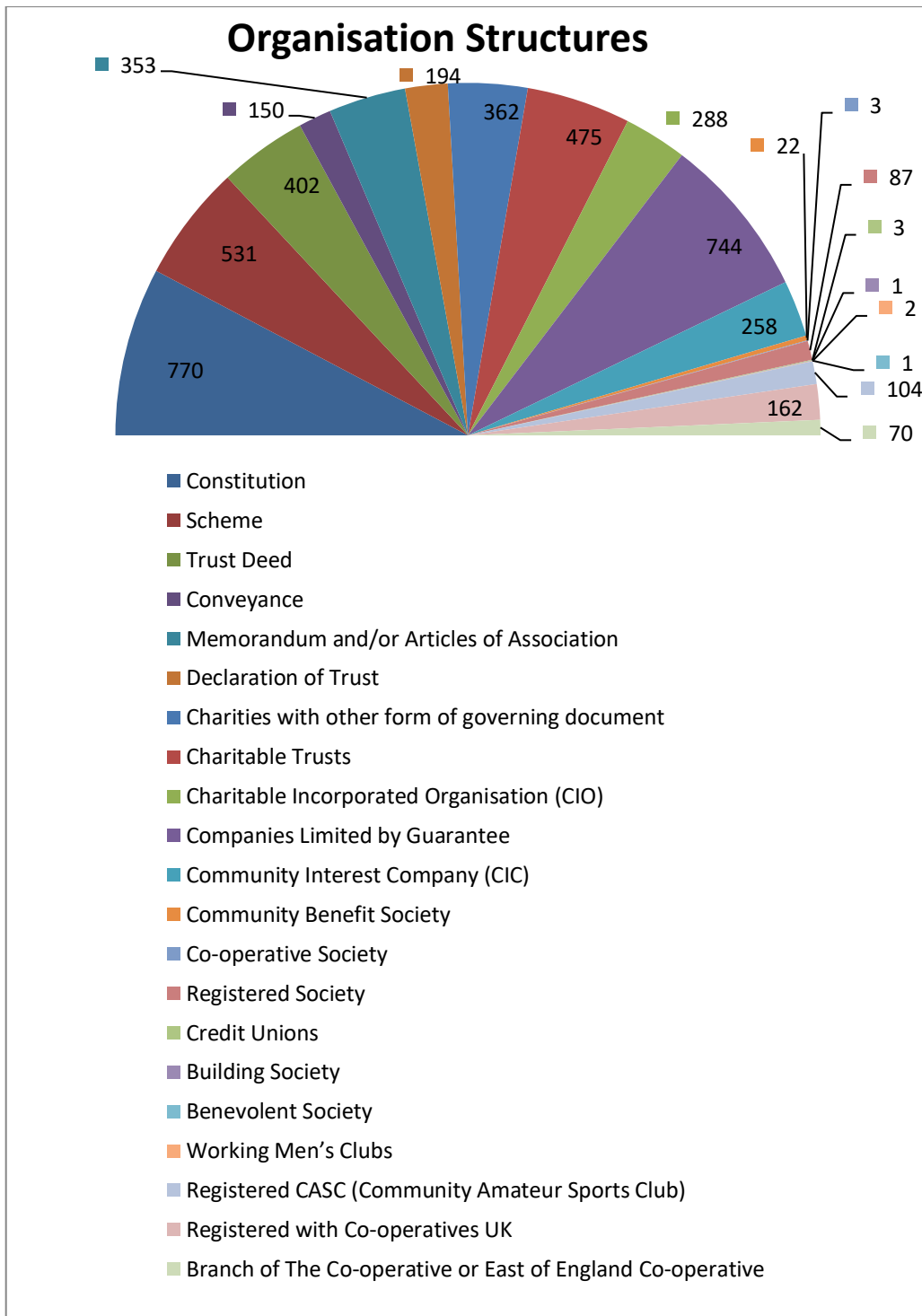


Figure 12 - Organisational Structure for organisations 'registered as something else'

We have undertaken a deep dive into two communities in Suffolk to identify the 'hidden' VCSE sector – Framlingham and Glemsford.

This section captures some of the impact and operations of the 'below the radar' non-registered community organisations in two small but typical market towns in Suffolk.

Framlingham:

Framlingham is a market town in East Suffolk with a population of 3705. A deep dive into the VCSE sector of the town has taken place and 171 local groups were found to exist. This figure includes:

- 27 Charities registered in Framlingham
- 12 Charities working in Framlingham with a main charity registration outside of Framlingham
- 38 further groups linked to one of the 27 main charities mentioned above.
- 1 Castle which is part of a national charity registered in London, but has locally based staff and volunteers
- 3 Registered societies
- 1 Community Interest Company
- 3 Charity shops
- The 1st Framlingham Scout Group have a Beavers Group; a Cubs Group; a Scout Group and an Explorers Group.
- The Framlingham Girl Guides have a 1st Rainbows Group; a 1st and 2nd Brownies Group; a 1st and 2nd Guides Group and a Senior section too.
- There are also some pro-active organisations within the market town who run various community initiatives:
 - The HOUR Community is a CIO that runs the following: Befriending; Cycling Without Age; Forget Me Not Club; Help at Home; Transport Service; and the Worry Tree Café.
 - Greener Fram is a member of the Transition Network and runs a number of initiatives such as: Community Garden; Fram LETS (Local Exchange Trading Scheme); FramFix (Community Mend Shed); Like Wholefoods; Swap or Mend; and The Free Food Shed.
 - Framlingham Library is a hub for community activity, and groups that meet there include: Adult Colouring Club; Board Game Club; Children's Craft Club; Children's Reading Drop-in; Free Creative Writing Class; IT Help; Knit and Natter; Mrs Fram Library Reading Group; Second Fram Library Reading Group; also offered by the Library are rooms for hire in the form of The Cell and The Old Court Room.

The picture is complex as many charities provide shelter for other community groups (both registered and informal with/without terms and conditions). We have counted organisations and groups where they have an independent legal status or agreed terms and conditions.

The range of organisations in Framlingham shows the plethora of types of voluntary, community and social enterprise sector that exist, and go towards helping to exemplify just how difficult it is to quantify the types and numbers of organisations that make up the VCSE working on the ground at a grass roots level. Looking at the list of groups and organisations there are a number of faith-based organisations, a number of sporting organisations, and Framlingham College, the local independent school, which is also increasingly involved with the local community.

Glemsford:

Glemsford is a large village in the west of the Babergh District. It has a population of 3666 at 2018 estimates. From desktop research, 82 local groups have been found to exist within the village. This includes:

- 6 Registered Charities
- 2 Registered Societies
- 1 Charity Shop
- There are also some pro-active organisations within the village who act as a venue for various community initiatives:
 - As with Framlingham, the Glemsford Library acts as a hub for community activities such as: Code Club: for children aged 9-11; Craft activities: for primary school age children; First Edition Reading Group: Top Time reading group for older people; First Edition: Top Time reading group for older people; Glemsford Wellbeing (Cancer) Support Group; Job club drop-in: careers advice and CV writing; Thursday Club: free and open to all; Tot Rock: Songs and action rhymes for toddlers in the adjoining village hall; Writers' group: open to all writers and poets; Scrabble Club; Stitch and Chatter and Sunday Crafts at the Library.
 - There is one brownie group in the village.
 - There is one Scout Group in Glemsford along with a Cubs group.

The research into the two deep dives has shown a complex and detailed VCSE structure at local level with interdependencies between organisations – sharing space, legal structures and supporting each other. This will influence how much support they seek from outside the local area and shows the importance of County wide organisations locating (albeit temporarily via lunch meetings, meet up clubs and so forth) locally to engage with these groups. Networks offer a valuable way to communicate sector trends, new ways of working, case studies of using – for instance digital technology – so that locally based groups and their eco-systems are able to access help and new ideas.

7. Summary - emerging trends for the VCSE Sector in Suffolk

This State of the Sector report has found a number of trends through data collection and analysis that we need to be mindful of as a sector, and that our partners will need to be aware of and to take action on. These trends include:

- 50.3% of identified VCSE organisations in Suffolk are registered charities.
- 133 or 4.1% have income over £500k.
- Suffolk has more micro size charities than the national average at 54.69% compared to 47.09% nationally.
- Average income to charities in Suffolk is 33% except for micro's where it is 15%.
- Nationally 2007-17 major (income £10m-£100m) charities have lost 11% of their income, super majors (income >£100m) have gained. Micro's lost 1% and medium's (£100k-£1m) lost 3%.
- Nationally numbers of micro's have reduced slightly whereas medium's have increased.
- Registered charity income in Suffolk has increased by 55% in the period 2004-2017.
- Nationally earned income in the period 2001-16 has risen from 39% to 52%. In the same period voluntary income has dropped from 50% to 41%.
- Looking at one source of income – National Lottery – a trend from 2004/5 to 2018/19 has been for fewer organisations to bid for more money (possibly to make the process more worthwhile). In the period 2004-2010 between 113-328 (one peak of 519) organisations per year bid whereas in the period 2011-18 the numbers were between 48-88 (one peak of 140). The amounts being bid for rose from £20-30k with one peak of £64k average, to an average of several hundred thousand.
- In Suffolk, 82% of income goes to large, major, and super major charities with an aggregate income of between £1-£100m.
- Of 2,539 charities that reported surplus/deficit to the Charities Commission, 40.6% reported a deficit.
- Looking at the 133 charities with >£500k income – the top sources of income were (in order) charitable activities, donations/legacies, and traded income. Nationally, traded income is growing so would expect this to be reflected in Suffolk, and for pressure to grow for Suffolk VCSE organisations to become more trade ready.
- Volunteering – national NCVO figures show that nearly 38% of people volunteer formally (with an organisation) at least once per year. 22%

of people volunteer regularly – at least once per month. If we extrapolate these figures to Suffolk then we find that 288,251 (39% of Suffolk population) volunteer at least once per year, 166,882 (22.5% of Suffolk population) volunteer at least once per month, 402,035 (54% of Suffolk population) volunteer informally at least once per year with 204,810 (27.7% of Suffolk population) volunteering informally more regularly.

- Volunteering opportunities tend to be in the daytime – and this will impact on those who work or who have other responsibilities. This would suggest that the recruitment offer, and support needs to be carefully tailored to allow workers, and those occupied in the day, to participate in volunteering.
- The ‘deep dives’ into the market towns of Framlingham and Glemsford found that the structure of VCSE organisations at local level can be quite complex with a trend towards slightly larger VCSE organisations (but still small) ‘sheltering’ other emerging community and VCSE organisations – helping with accommodation, structures, support and so forth.
- As a final trend – there are a plethora of legal structures for our VCSE organisations in Suffolk – finding the right structure and governance is key to future operations and success. This needs careful thought and provision of ‘neutral’ business advice services to help an emerging or changing organisation to choose the most appropriate structure for their purposes.

8. Impact of the Sector

The impact of the VCSE sector in Suffolk is significant, multi layered and has many interdependencies. The sector delivers a wide range of services and support to those in need such as children, young people, the elderly, those with disabilities or learning difficulties, along with many services that contribute to health and wellbeing, support to the natural and built environment, arts and culture and that support inclusive economic growth. The sector lobbies on behalf of the groups above to ensure that their views are well articulated at the appropriate level. For many reading this report, these impacts will not be a surprise, however for others it is useful to highlight some practical examples of the impact of the sector below.

Good Neighbour Schemes: a project that supports schemes across Suffolk and managed by Community Action Suffolk. The Good Neighbour Schemes play a key role in supporting locally based volunteering. One such scheme was set up in January 2020 and is now playing a key role with volunteers working hard during the coronavirus outbreak to help those in their

community. The volunteers will be picking up supplies for residents from Orford General Store and will also be looking to get medical prescriptions from Orford Surgery delivered to those in need.

Game Anglia: is a not-for-profit Community Interest Company whose mission it is to grow the video games industry in the East of England region using a network of game development professional and students. They have delivered a major gaming conference in 2017 and have attracted key games developers to speak at University of Suffolk to inspire and engage young people in the gaming industry. They also run events that are focused on the skills needed to join the Games Industry or start your own business in the industry.

9. Recommendations

1. The VCSE sector need to develop more accurate data on the sector – starting with a few areas where we know we need more information:
 - Social enterprises – more information needs to be available to those wanting to establish and requiring support for sustainability and growth.
 - Information on the purposes of VCSE organisations across Suffolk – this may identify gaps that reflect developing need, for instance we do not have any/many gang related grassroots organisations. This may be too specialist but if we are aware of the issue, we may later be able to deal with it through other related routes.
 - More information on income and where it comes from.
2. A better understanding of what is meant by ‘sustainability’ is needed. This links to issues such as business planning, and business continuity planning. It also links to a better understanding of how to use funding in a strategic sense – planning when to bid for specific funding and when not to.
3. Partnership and collaboration is an area that flows naturally from the need of the sector to look at sustainability and funding – our survey could ask what VCSE organisations are doing in terms of partnering with others – there are some good examples available where groups of VCSE organisations are working together. However, we need to showcase some of these to enable knowledge across the sector to grow.
4. Improve training and development – national standards and qualifications relevant to the sector. CAS has a package of training and development for the sector which ranges from ‘essentials’ such as safeguarding to funding, GDPR and other areas of interest such as Social Value. Other sector partners also have areas of specialism and skilled staff to deliver quality accredited training. The Suffolk sector needs to work with national

partners such as NCVO and NAVCA on developing a national standard for the sector.

5. Improved business planning – both from the perspective of managing finance and particularly reserves, but more widely in terms of business continuity planning – what will the organisation do when the worst happens? There are a range of sector organisations and pro bono partners who could help with this – CAS operates Suffolk Pro Help, and there are sector leading organisations across Suffolk who have experience and skills in this area.
6. The need for the sector to capture volunteer activity more effectively and translate this into a value that is recognised by the wider economy – we are able to capture opportunities but we have gaps in knowledge around who is doing what across the plethora of VCSE organisations. This stretches from registered charities - who can usually provide data - to small community groups who may not be registered. The latter may have many volunteers doing great work – but it goes largely unrecorded so we do not know what the impact would be if it reduced or ceased for any reason.

Appendices

Appendix 1 – Civil Society Sector Gross Value Added – value to the economy

The Department for Culture, Media and Sport (DCMS) has recently published DCMS Sectors Economic Estimates 2018 (provisional): Gross Value Added¹⁵ where one of the sectors examined was Civil Society. Civil Society contributed £16.2bn to the UK economy in 2018, accounting for 0.8% of UK GVA. GVA figures are only available on a nominal basis; they are therefore not compared over time, as using current prices does not account for inflation. According to DCMS, the contribution of Civil Society to UK economy increased from 0.65% in 2010 to 0.84% in 2018.

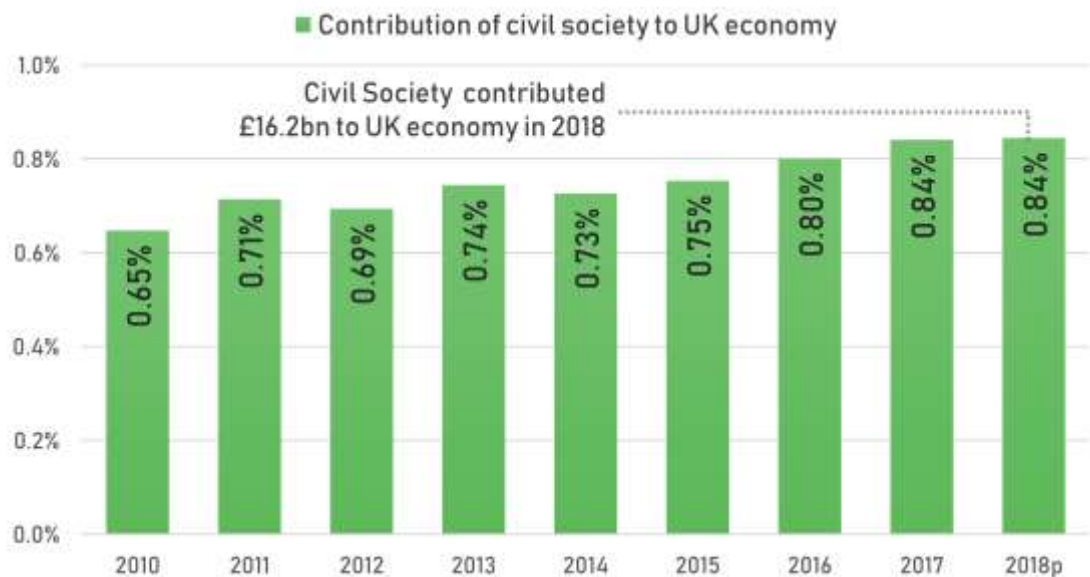


Figure 13 - Contribution of the Civil Society Sector to the UK economy in Current Prices: 2010 to 2018

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https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/863632/DCMS_Sectors_Economic_Estimates_GVA_2018.pdf

Appendix 2 – Income

According to NCVO in the 2019 Almanac, assets continued to grow mainly as a result of strong investment performance,¹⁶ and the “overall growth in income was due to grants and investments, while income from the public and government plateaued...(in their analysis, NCVO confirmed that) other sources of income include money from ...investments (8%)¹⁷”, so this seems to indicate that the 3% in income from this source in Suffolk is not representative of the national picture.

Figure 14 - Income by organisation size

Suffolk Registered Charities	National % Proportion of Income 2007 ¹⁸	National % Total Income (2017) ¹⁹	Suffolk % Total Income (2017)	Suffolk Total Income (2017)	National % Proportion of Organisations (2007) ²⁰	National % Total No of Charities (2017) ²¹	Suffolk % Total No of Charities (2017)	Suffolk Total No of Charities (2017)
Micro (<£10k)	0.7%	0.85%	0.69%	£4,418,110	53.2%	50%	54.69%	1603
Small (£10k-£100k)	5.2%	4%	5.09%	£32,714,123	31.5%	33%	32.62%	956
Medium (£100k-£1m)	18.3%	15%	11.67%	£75,039,273	12.6%	14%	10.41%	305
Large (£1m-£10m)	31.8%	29%	30.04%	£193,129,827	2.4%	3%	2.01%	59
Major (£10m-£100m)	43.9%	32%	21.75%	£139,848,627	0.3%	0.4%	0.24%	7
Super Major (£100m+)	N/A	20%	30.76%	£197,730,000	N/A	0.02%	0.03%	1
Total	100.0%	100%	100.00%	£642,879,960	100.00%	100%	100.00%	2931

* Figs above taken from national NCVO research

¹⁶ <https://data.ncvo.org.uk/sector-finances/>

¹⁷ <https://data.ncvo.org.uk/sector-finances/income-sources/>

¹⁸ NCVO Almanac 2010 - <https://ncvo-publishing-storage.s3.amazonaws.com/documents/ncvo-uk-civil-society-almanac-2010-small.pdf>

¹⁹ NCVO Civil Society Almanac (2018)

²⁰ NCVO Civil Society Almanac (2010)

²¹ NCVO Civil Society Almanac (2019) <https://data.ncvo.org.uk/about/almanac-data-tables/>

Figure 15 – Super Major, Major and Large Charity Income in Suffolk

NAME	INCOME 2017	SIZE
SUE RYDER	197,730,000	SUPERMAJOR
THE HAVEBURY HOUSING PARTNERSHIP	34,992,000	MAJOR
ALBERT MEMORIAL COLLEGE	30,616,564	MAJOR
THE SECKFORD FOUNDATION	19,767,428	MAJOR
IPSWICH SCHOOL	16,443,732	MAJOR
ANIMAL HEALTH TRUST	14,558,000	MAJOR
THE FEBRUARY FOUNDATION	12,275,570	MAJOR
SNAPE MALTINGS	11,195,333	MAJOR
THE KINGHAM HILL TRUST	9,948,122	LARGE
ST ELIZABETH HOSPICE (SUFFOLK)	9,550,412	LARGE
ABBEYCROFT LEISURE	8,540,295	LARGE
ST EDMUNDSBURY AND IPSWICH DIOCESAN BOARD OF FINANCE	8,373,000	LARGE
ST JOSEPH'S COLLEGE LIMITED	8,232,047	LARGE
CHARITY FOR ROMAN CATHOLIC PURPOSES ADMINISTERED IN CONNECTION WITH THE ENGLISH PROVINCE OF THE COMMUNITY OF THE RELIGIOUS OF JESUS AND MARY	7,088,910	LARGE
ST NICHOLAS HOSPICE SUFFOLK	6,306,179	LARGE
ORMISTON FAMILIES	6,295,000	LARGE
SENTINEL LEISURE TRUST	5,873,517	LARGE
THE INJURED JOCKEYS FUND	5,847,662	LARGE
BRS EDUCATION LIMITED	4,943,665	LARGE
ORWELL PARK SCHOOL EDUCATIONAL TRUST LTD	4,836,775	LARGE
THE NEW WOLSEY THEATRE COMPANY LIMITED	4,813,883	LARGE
WORLD LAND TRUST	4,479,000	LARGE

NAME	INCOME 2017	SIZE
SUFFOLK WILDLIFE TRUST LIMITED	4,339,000	LARGE
SIM INTERNATIONAL (UK)	4,203,342	LARGE
SAINT FELIX SCHOOLS	3,933,198	LARGE
MAHARISHI FOUNDATION	3,918,641	LARGE
WILTSHIRE CREATIVE	3,666,694	LARGE
OLD BUCKENHAM HALL (BRETtenham) EDUCATIONAL TRUST LTD	3,313,781	LARGE
ACCESS COMMUNITY TRUST	3,142,897	LARGE
SUFFOLK AGRICULTURAL ASSOCIATION	3,139,598	LARGE
AGE UK SUFFOLK	3,137,818	LARGE
LARCHCROFT EDUCATION TRUST	3,009,606	LARGE
YMCA SUFFOLK	2,924,796	LARGE
SUFFOLK COMMUNITY FOUNDATION	2,884,297	LARGE
MY WISH CHARITY	2,620,764	LARGE
SOUTH SUFFOLK LEISURE	2,611,223	LARGE
SUFFOLK MIND	2,593,387	LARGE
ANGLIA CARE TRUST	2,351,969	LARGE
DANCE EAST	2,261,486	LARGE
HOME OF HORSERACING TRUST	2,179,729	LARGE
SUFFOLK FAMILY CARERS	2,118,478	LARGE
TREEBEARD TRUST	2,044,017	LARGE
LIGHTHOUSE CONSTRUCTION INDUSTRY CHARITY	1,969,851	LARGE
COMMUNITY ACTION SUFFOLK	1,929,704	LARGE
SOUTH LEE SCHOOL LIMITED	1,892,181	LARGE
RACING WELFARE	1,829,000	LARGE
BURY ST EDMUNDS THEATRE MANAGEMENT LIMITED	1,749,033	LARGE

NAME	INCOME 2017	SIZE
MARINA THEATRE TRUST	1,736,707	LARGE
THE FORGE COMMUNITY CHURCH	1,711,503	LARGE
ALDEBURGH MUSIC ENDOWMENT FUND	1,679,264	LARGE
HEADWAY SUFFOLK LTD	1,657,422	LARGE
ORWELL MENCAP	1,642,084	LARGE
STOKE COLLEGE EDUCATIONAL TRUST LTD	1,630,963	LARGE
PRO CORDA TRUST	1,608,672	LARGE
MRS L D ROPE'S THIRD CHARITABLE SETTLEMENT	1,581,967	LARGE
THE BRITTEN-PEARS FOUNDATION	1,465,340	LARGE
THE NUTRITION SOCIETY	1,441,326	LARGE
BOWS AND ARROWS	1,341,245	LARGE
THE NATIONAL HORSERACING MUSEUM	1,327,219	LARGE
IPSWICH HOUSING ACTION GROUP LIMITED	1,320,777	LARGE
THE THOROUGHBRED BREEDERS ASSOCIATION	1,312,223	LARGE
INSPIRE SUFFOLK LTD	1,284,337	LARGE
LIGHTHOUSE WOMEN'S AID LIMITED	1,171,947	LARGE
FAIRSTEAD HOUSE SCHOOL TRUST LTD	1,163,955	LARGE
EAST SUFFOLK AND NORTH ESSEX NHS FOUNDATION TRUST CHARITABLE FUNDS	1,081,000	LARGE
GODOLPHIN INTERNATIONAL THOROUGHBRED LEADERSHIP PROGRAMME LIMITED	1,071,536	LARGE
BREADLINE AFRICA	1,007,383	LARGE

Appendix 3 – Data to show trends in numbers of charities of different sizes – Nationally and in Suffolk

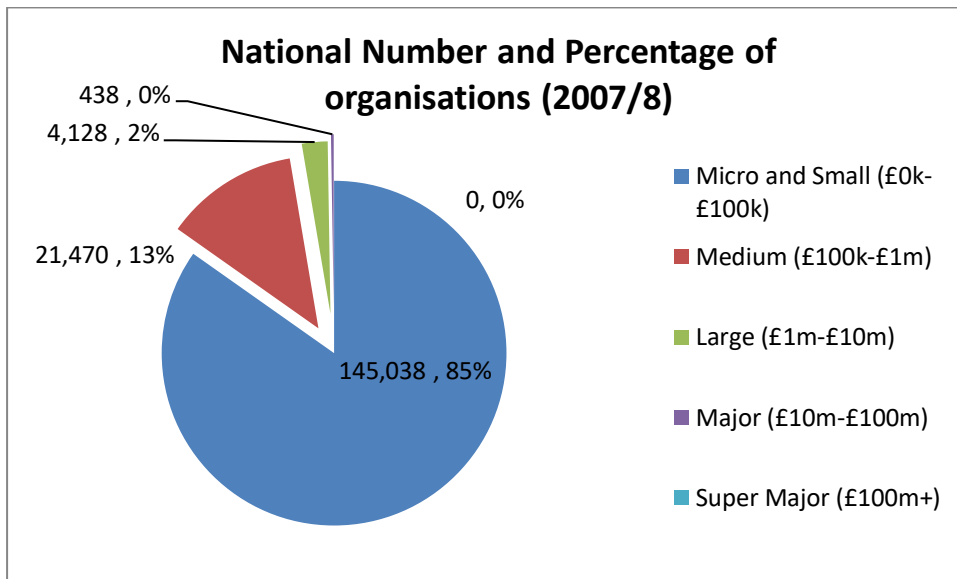


Figure 16 - National Number and Percentage of organisations (2007/8)

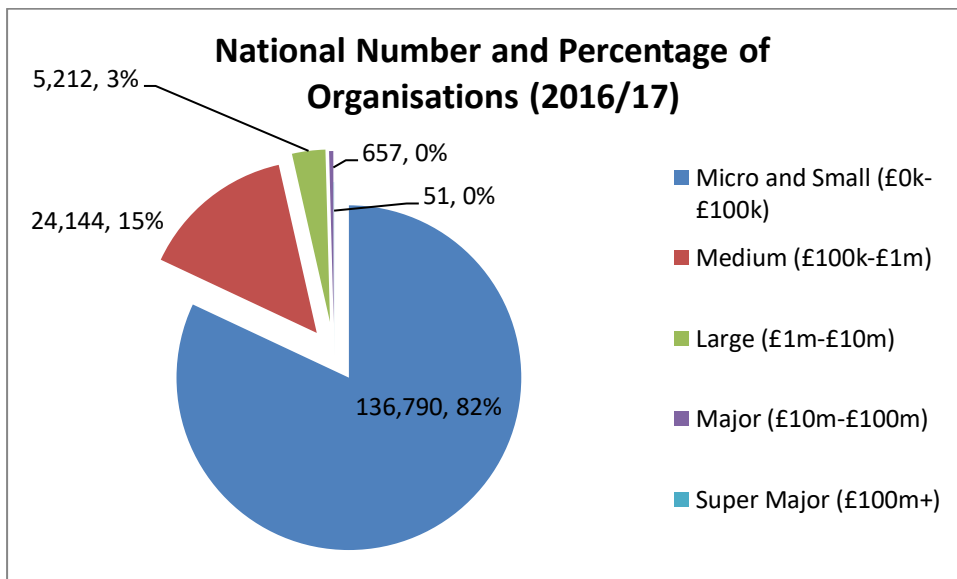


Figure 17 - National Number and Percentage of Organisations (2016/17)

The number and percentage of micro organisations nationally has declined slightly between 2007/08 and 2016/17. Medium sized charities have increased in number and % of total – from 21,470 in 2007/08 to 24,144 in 2016/17, 13% and 15% of the total respectively. Unfortunately we do not have comparative figures for Suffolk for this period – Suffolk has traditionally well reflected national figures across most areas therefore we can assume that (in the absence of specific Suffolk data) national figures usually reflect the situation in Suffolk. The Figures earlier in the document show that Suffolk has a higher proportion of micro charities than the national average figures.

Some of the potential implications of this data have been highlighted separately by NCVO. They report that there are over 136,000 registered small and micro charities in the UK, making up 82% of all charities. More than half of them (58%) have an income under £10,000. There are also many organisations that are too small to register and therefore are not captured in the NCVO data. Some 2001 research by New Economic Foundation estimates an additional 600,000 to 900,000 of such unincorporated groups and organisations. The NCVO data also shows that most of the small organisations (79%) work in their local area rather than on national or international level. A much higher proportion working locally than of larger organisations.

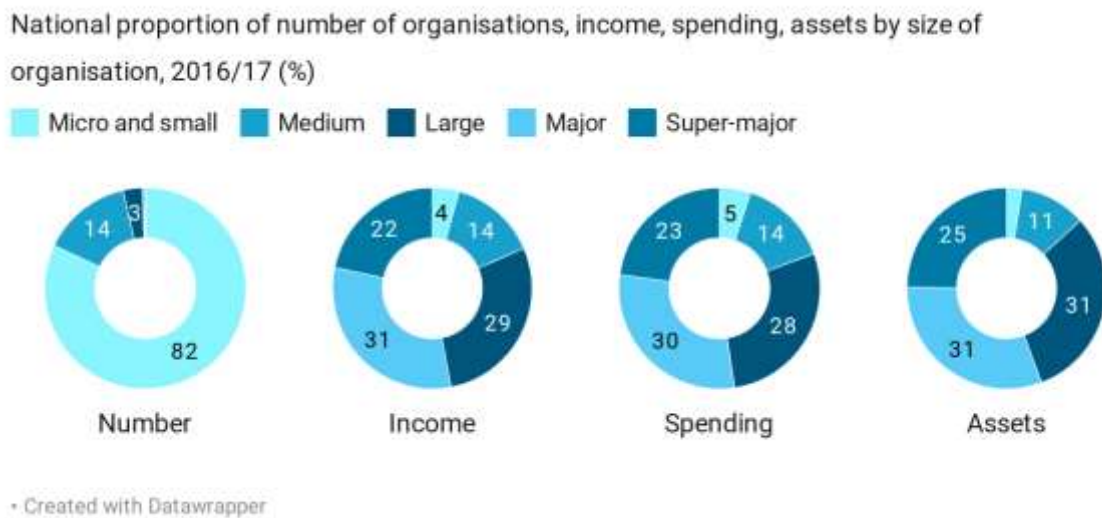


Figure 18 - National proportion of number of organisations, income, spending, assets by size of organisation, 2016/17 (%)

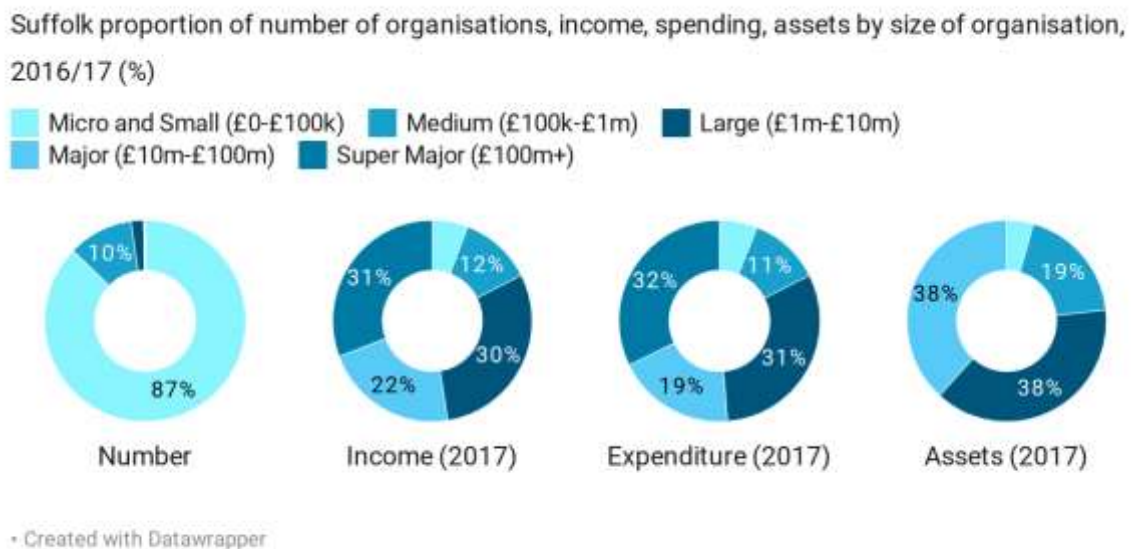


Figure 19 - Suffolk proportion of number of organisations, income, spending, assets by size of organisation, 2016/17 (%)

Appendix 4 – Lottery Funding in Suffolk

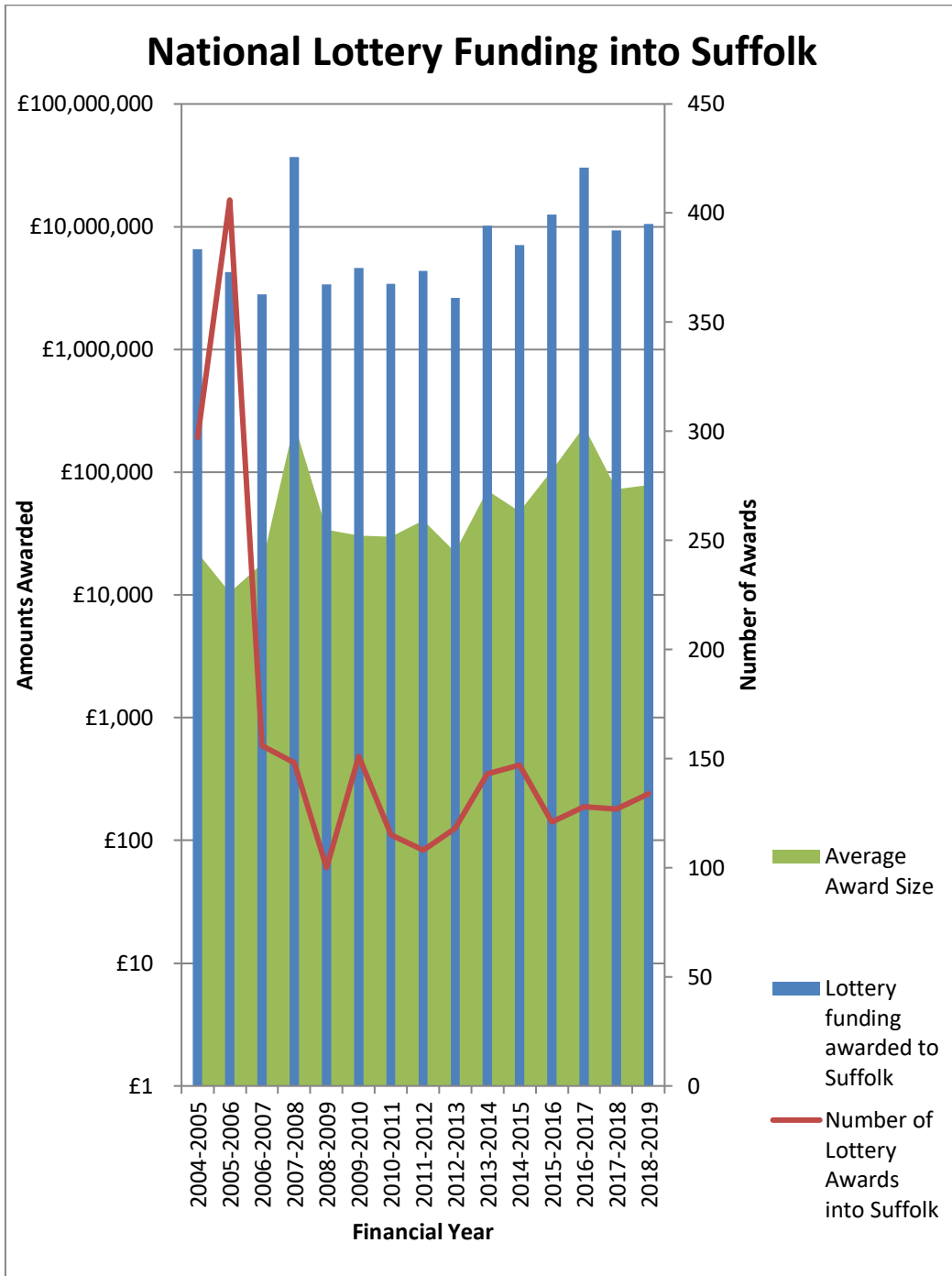
Figure 20 and Figure 21 below show one source of funding that is received by our VCSE sector in Suffolk, and how it has varied over time – The Big Lottery Fund, Sport England, The National Lottery Heritage Fund, Arts Council England, The National Lottery Community Fund. After a significant peak in 2005/06 there was ‘business as usual’ in terms of receipts until 2015-2017 (2 years) when several large projects received significant input from National Lottery resources. These large scale projects included the National Trust with Sutton Hoo plus many smaller ones based in local communities.

Figure 20 - National Lottery Funding coming into Suffolk

The Big Lottery Fund, Sport England, The National Lottery Heritage Fund, Arts Council England, The National Lottery Community Fund			
Financial Year	Lottery funding awarded to Suffolk	Number of Lottery Awards into Suffolk	Average Award Size
2004-2005	£6,568,489	297	£22,116
2005-2006	£4,265,716	406	£10,507
2006-2007	£2,805,269	156	£17,982
2007-2008	£36,798,175	148	£248,636
2008-2009	£3,391,063	100	£33,911
2009-2010	£4,618,317	151	£30,585
2010-2011	£3,422,164	115	£29,758
2011-2012	£4,382,755	108	£40,581
2012-2013	£2,635,595	118	£22,336
2013-2014	£10,187,480	143	£71,241
2014-2015	£7,060,286	147	£48,029
2015-2016	£12,508,951	121	£103,380
2016-2017	£30,303,849	128	£236,749
2017-2018	£9,280,949	127	£73,078
2018-2019	£10,543,879	134	£78,686

Source: <https://grantnav.threesixtygiving.org/>

Figure 21 - National Lottery Funding into Suffolk



Source: <https://grantnav.threesixtygiving.org/>

The chart above shows the numbers of Lottery Awards and the amount of funding through National Lottery programmes into Suffolk.

Appendix 5 – The Suffolk picture regarding income

Figure 22 - Breakdown of income by size of organisation in Suffolk

Charity Size	Suffolk % Total Income (2017)
Micro (<£10k)	0.69%
Small (£10k-£100k)	5.09%
Medium (£100k-£1m)	11.67%
Large (£1m-£10m)	30.04%
Major (£10m-£100m)	21.75%
Super Major (£100m+)	30.76%
Total	100.00%

Figure 23 - Breakdown of surplus / deficit by size of organisation in Suffolk

Charity Size	No. of Charities	No. of Charities with No Surplus or Deficit at end of 2017	No. with a surplus at end of 2017 FY	No. with a deficit at end of 2017 FY	Combined Surplus £	Combined Deficit £
Micro (<£10k)	1365	146	704	515	£873,876	-£2,435,012
Small (£10k-£100k)	956	4	583	369	£4,642,281	-£3,497,465
Medium (£100k-£1m)	305	3	186	116	£9,169,912	-£4,069,529
Large (£1m-£10m)	59	1	29	29	£10,345,264	-£8,959,489
Major (£10m-£100m)	7	0	5	2	£25,551,715	-£2,783,501
Super Major (£100m+)	1	0	0	1	£0	-£482,000
Total	2693				£50,583,048	£22,226,996.00

Appendix 6 – Suffolk Charities Income Details

Figure 24 - Income of the 133 Charities

Charity size by Income	Income of the 133 Charities	No of Charities
Medium (£100k-£1m)	£41,229,189	61
Large (£1m-£10m)	£182,757,419	61
Major (£10m-£100m)	£162,697,446	10
Super Major (£100m+)	£101,671,000	1
Total	£488,355,054	133

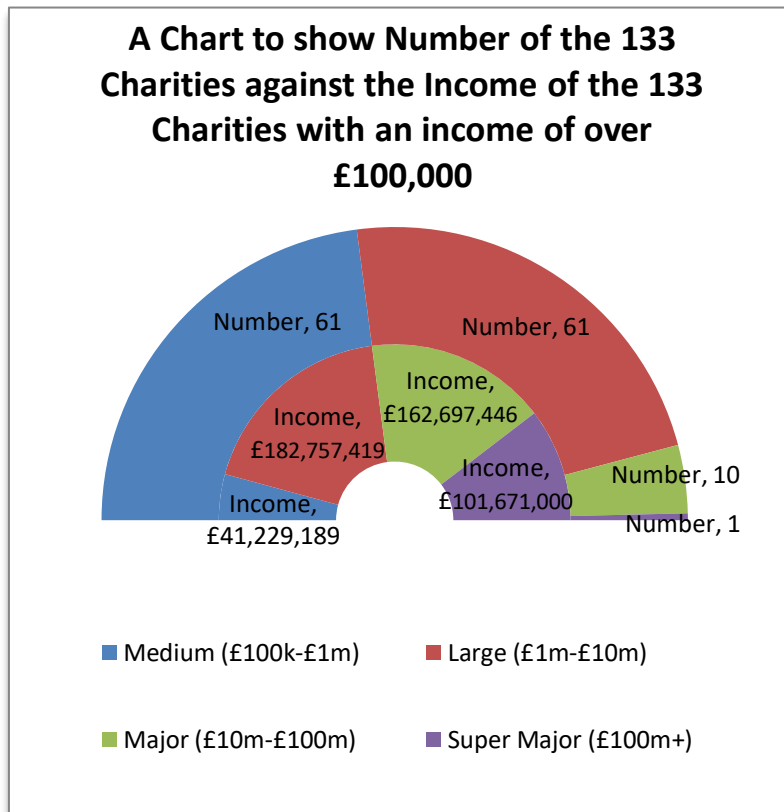


Figure 25 - The number of the 133 charities and income of the 133 Charities

Figure 26 - Income Sources across the 133 charities

Income Sources (across the 133 charities)	Income
Legacies	£41,710,435
Endowments	£13,956,022
Income from Donations, Legacies and Grants combined	£129,961,802
Income from Charitable Activities	£248,493,358
Income from other trading and fundraising activities	£88,472,699
Investment Income	£13,024,767
Income – other	£8,402,426
Total Income	£488,355,054

Appendix 7 – Volunteers

Figure 27 - Numbers of Trustees, Staff and Volunteers across the 133 charities

Trustees, Staff and Volunteers across the 133 charities	Number
Number of Trustees	1,135
Number of Employees	9,852
Number of Volunteers	27,360
Total	38,347

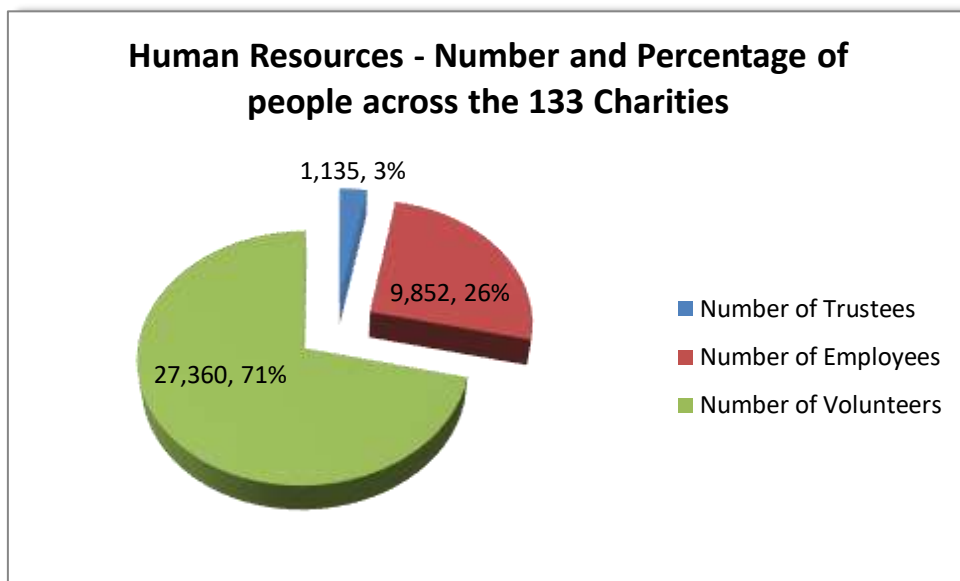


Figure 28 - Human Resources - Number and Percentage of people across the 133 charities

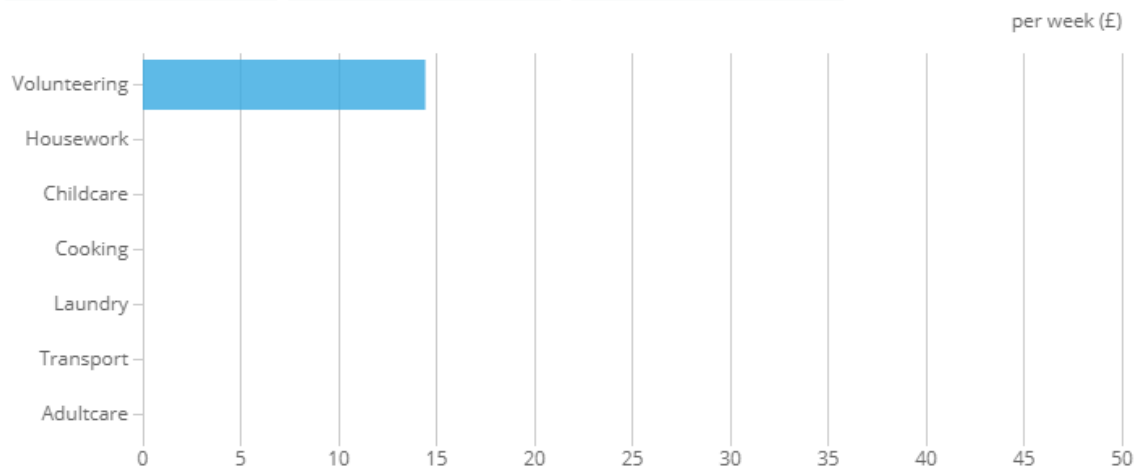
Set out below is a 'volunteer time' calculator to enable a calculation regarding the value of volunteer time to be made:

Figure 29 - Volunteer Time - Unpaid Work Calculator

Want to know how much your volunteering time is worth? Check out our unpaid work calculator.

Find the value of your unpaid work by entering the hours you spend on each task per week:

Housework - 0 +	Childcare - 0 +	Cooking - 0 +	Laundry - 0 +
Transport - 0 +	Adult care - 0 +	Volunteering - 1 +	



Total per week: £14.43	Total per year: £750.36
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Share the value of your unpaid work



▼ Embed code

Source:
<https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/articles/billionpoundlossinvolunteeringeffort/2017-03-16>

Figure 30 - Days and Time of Day of Volunteering Opportunities in Suffolk

Days and Time of Day of Volunteering Opportunity	Number of Opportunities
Monday	788
Monday AM	708
Monday PM	713
Monday Evening	310
Tuesday	825
Tuesday AM	715
Tuesday PM	736
Tuesday Evening	329
Wednesday	816
Wednesday AM	724
Wednesday PM	739
Wednesday Evening	304
Thursday	807
Thursday AM	720
Thursday PM	738
Thursday Evening	307
Friday	786
Friday AM	718
Friday PM	724
Friday Evening	286
Saturday	555
Saturday AM	514
Saturday PM	509
Saturday Evening	264
Sunday	277
Sunday AM	231
Sunday PM	256
Sunday Evening	27

Source: Volunteer Suffolk

Appendix 8 – Registered Organisations

List of organisations in Suffolk who are registered as ‘something else’:

- 770 have a Constitution as their governing document;
- 531 have a Scheme as their governing document;
- 402 have a Trust Deed as their governing document;
- 150 have a Conveyance; 353 have Memorandum and/or Articles;
- 194 have a Declaration of Trust;
- 288 registered as a CIO;
- 362 Charities have another form of governing document (some have more than one type of governing document):
 - Unincorporated association
 - 475 Charitable Trusts
 - 288 organisations registered as a Charitable Incorporated Organisation (CIO)
 - 744 Companies limited by guarantee - the Charity Commission identifies that groups are likely to be registered with Companies House as being Limited by Guarantee and having no share capital. The number of Companies Limited by Guarantee with a registered address in Suffolk have been looked at from Companies House data. Those that are clearly not VCSE sector organisations from this list have been removed (for example property management companies, etc.) 744 remaining Companies Limited by Guarantee. Some of these will also be registered with the Charity Commission as well.
 - 258 organisations registered as a Community Interest Company (CIC)
 - 22 registered as a Community Benefit Society
 - 3 organisations are registered in Suffolk as a Co-operative Society whilst 162 organisation in Suffolk are registered with Co-operatives UK (though 70 of these are branches of The Co-operative or the East of England Co-operative large scale organisations)
 - 87 registered as a Registered Society (includes those registered previously as Industrial and Provident Societies).
 - 3 Credit Unions
 - 1 Building Society
 - 1 Benevolent Society
 - 2 Working Men’s Clubs
 - 104 groups in Suffolk are a Registered CASC (Community Amateur Sports Club)