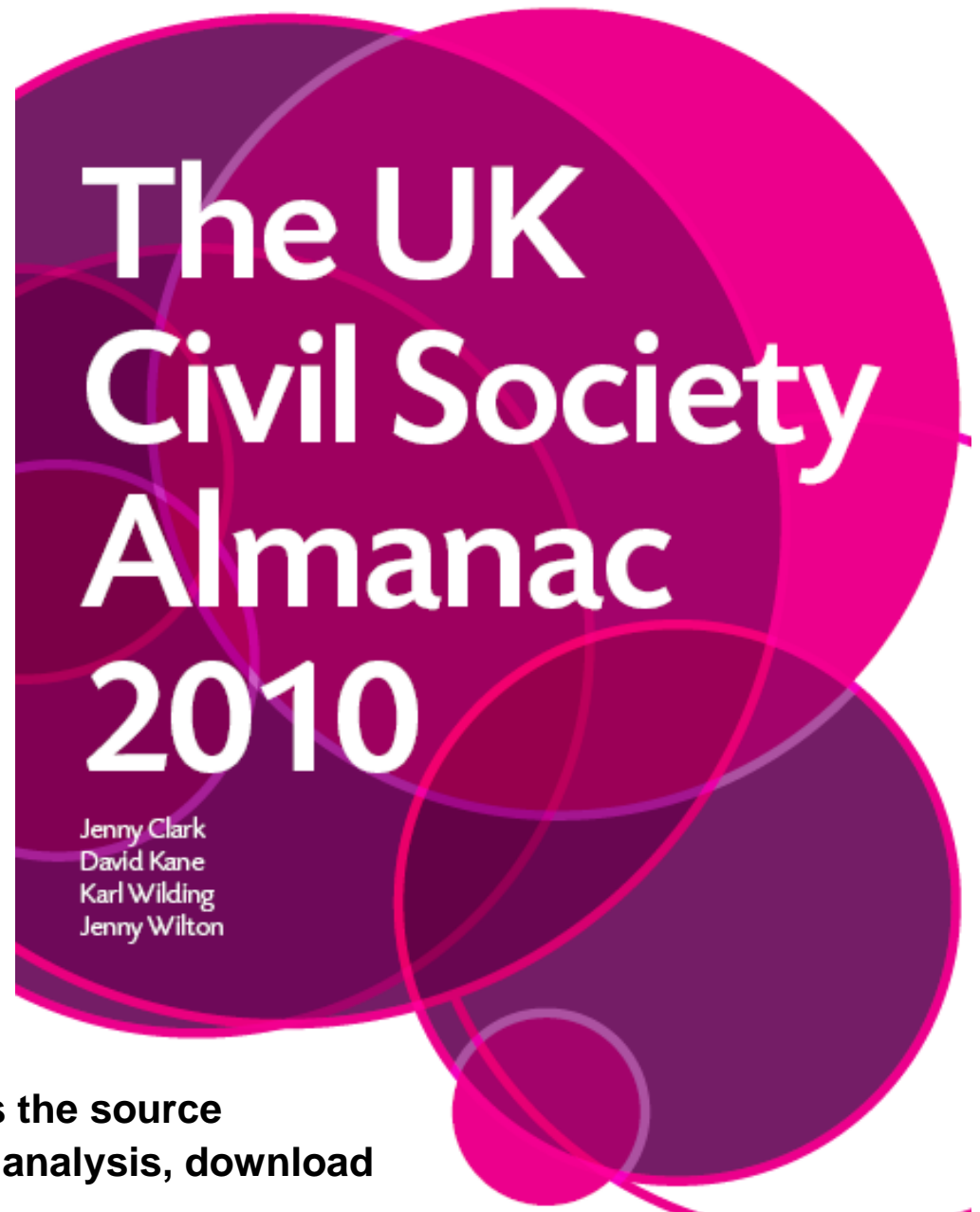


The UK Voluntary Sector: funding and resources

Findings from the Civil
Society Almanac 2010

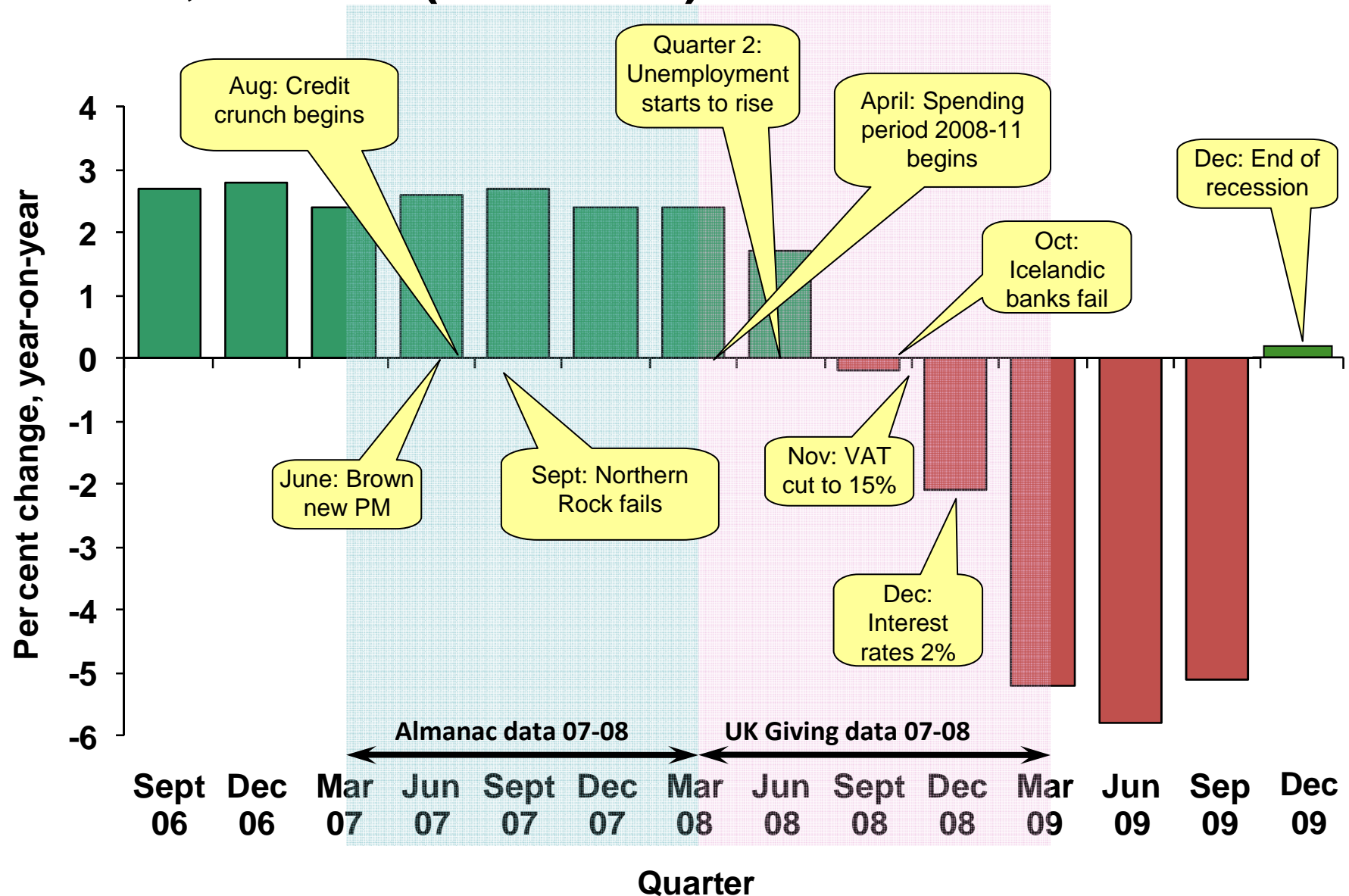


Twitter: [#almanac2010](https://twitter.com/almanac2010)

Feel free to share, but please cite NCVO as the source

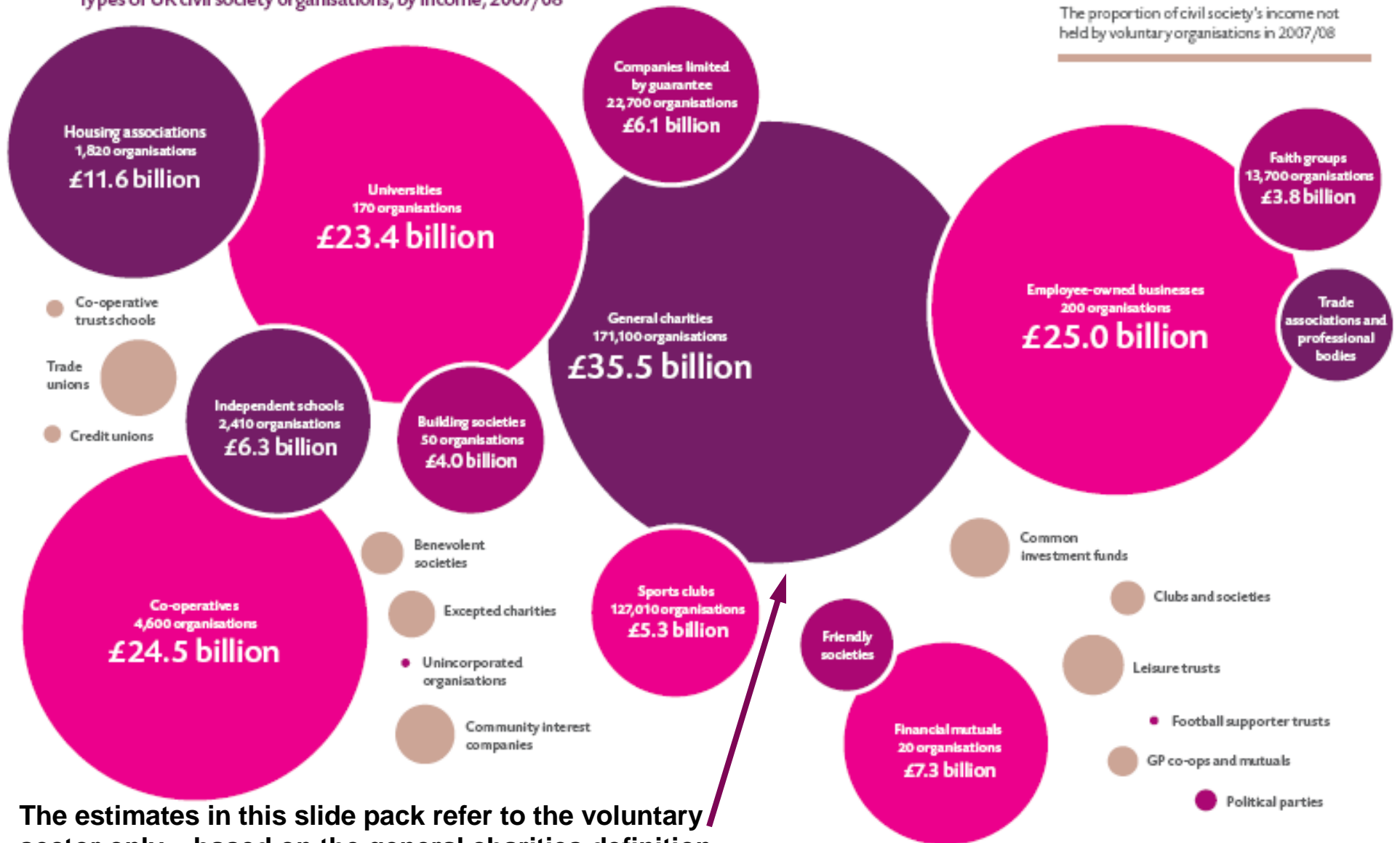
www.ncvo-vol.org.uk/almanac - comment, analysis, download

Most of our charities data cover the credit crunch, not the (technical) recession



What is civil society?

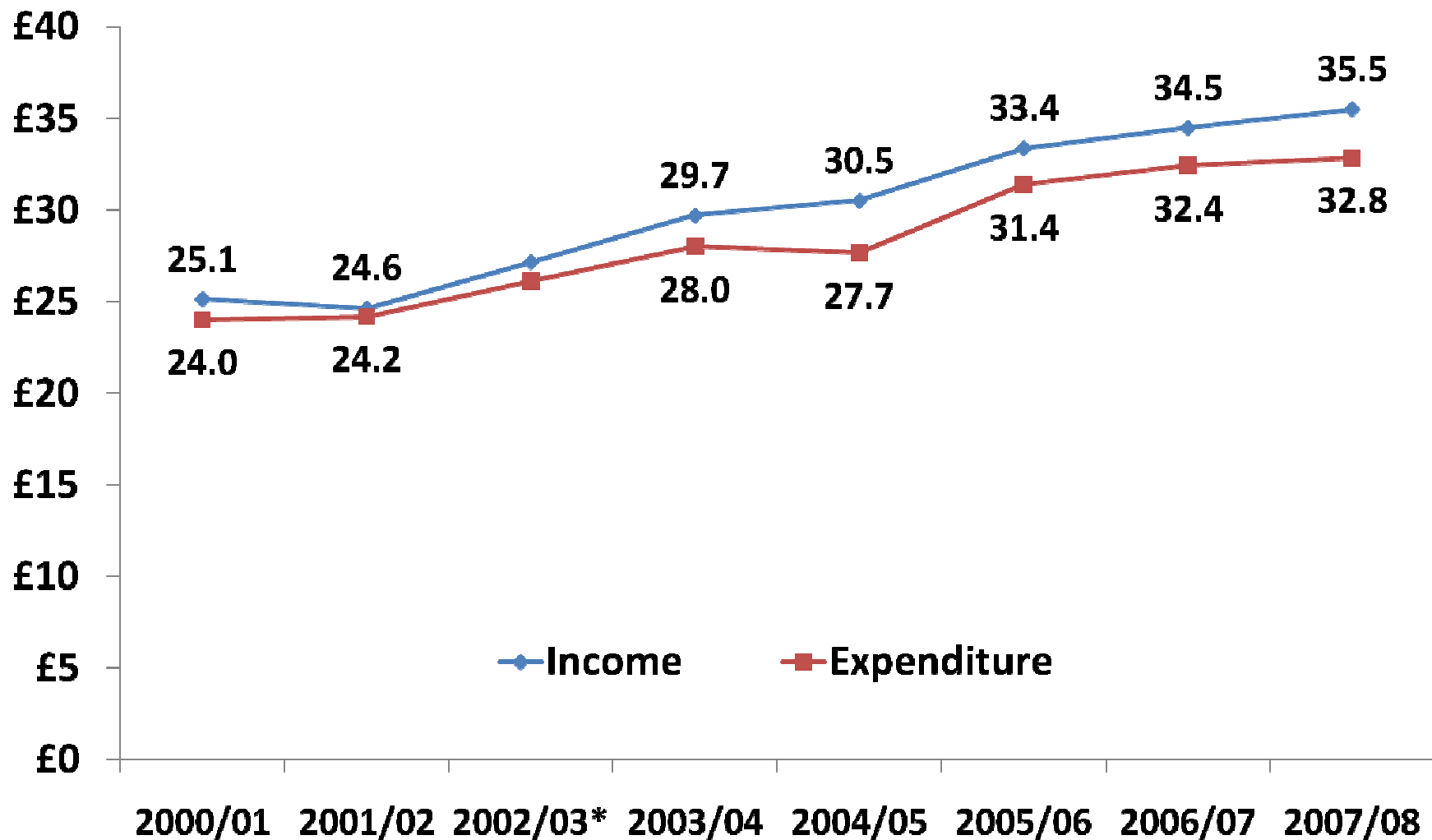
Types of UK civil society organisations, by income, 2007/08



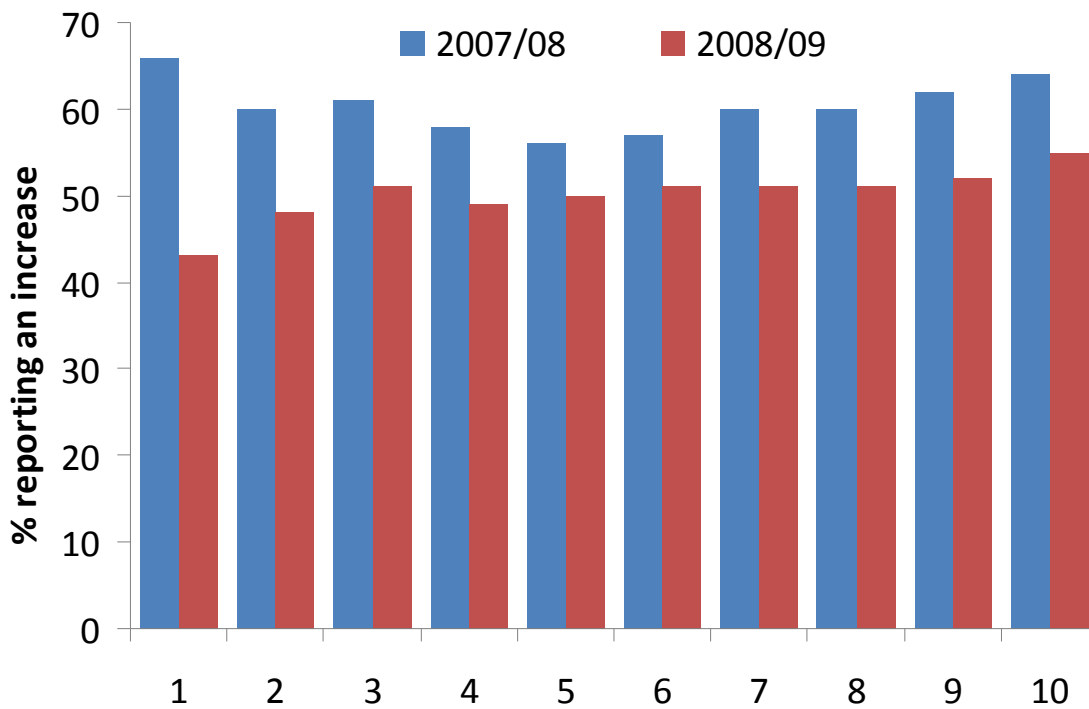
The estimates in this slide pack refer to the voluntary sector only – based on the general charities definition

1. Trends in aggregate funding

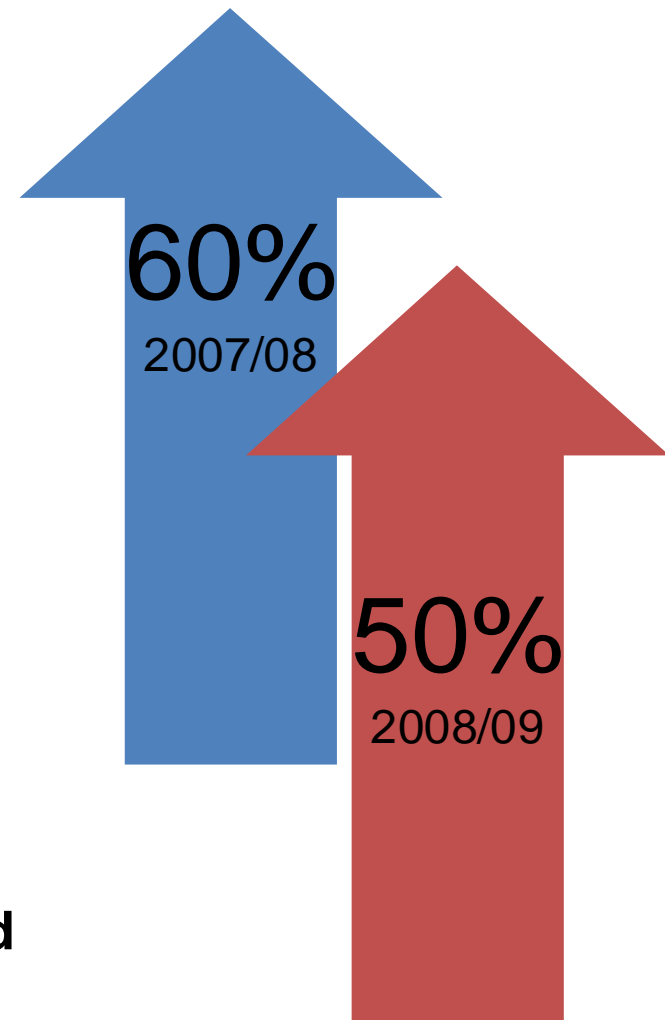
The slowdown in expenditure growth may indicate activity levels have peaked...



With early filers for 2008/09 confirming this...



What % of organisations have reported an increase in income? (By decile)



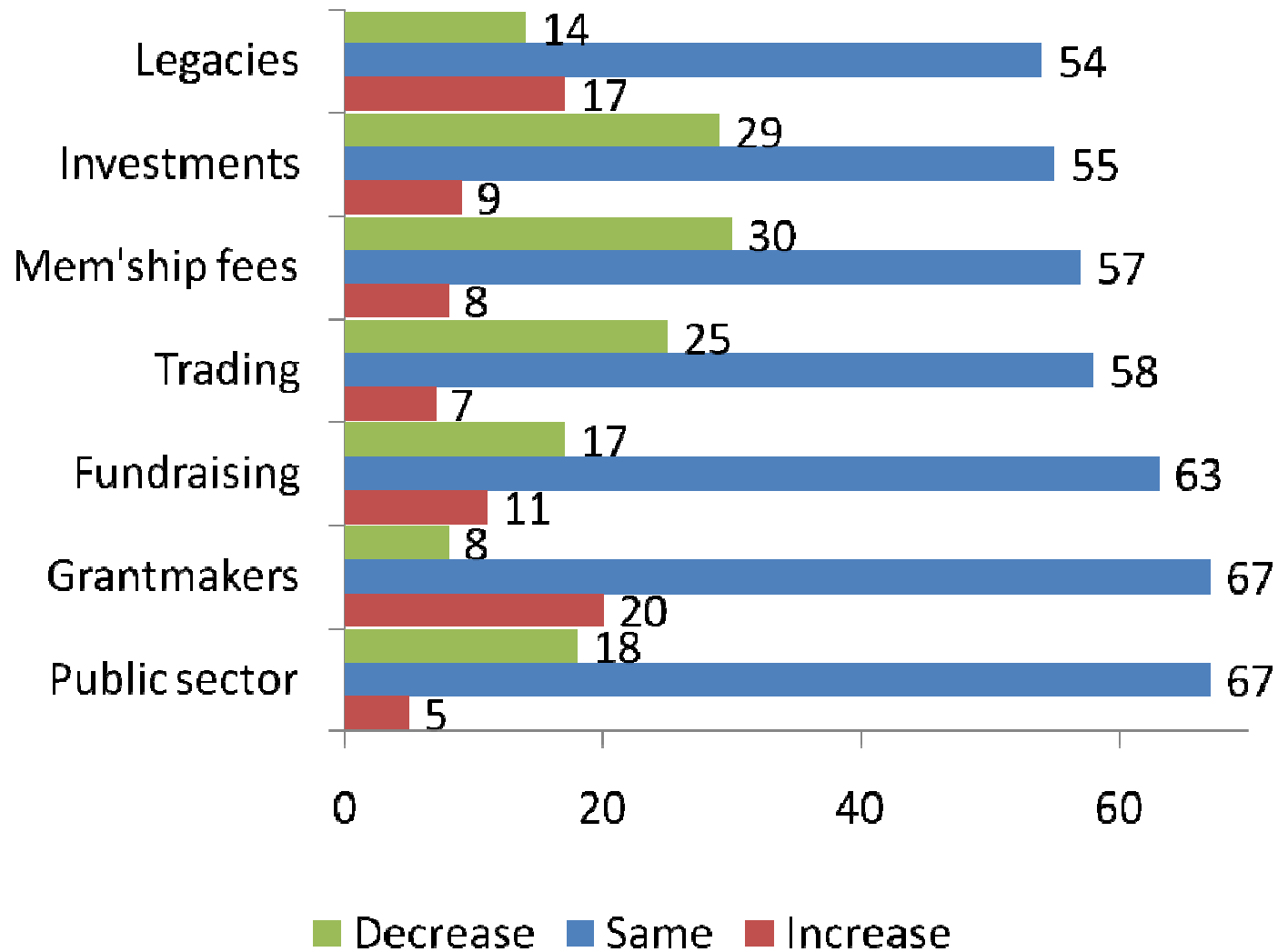
All sample

Many expect no change in income in the short term...

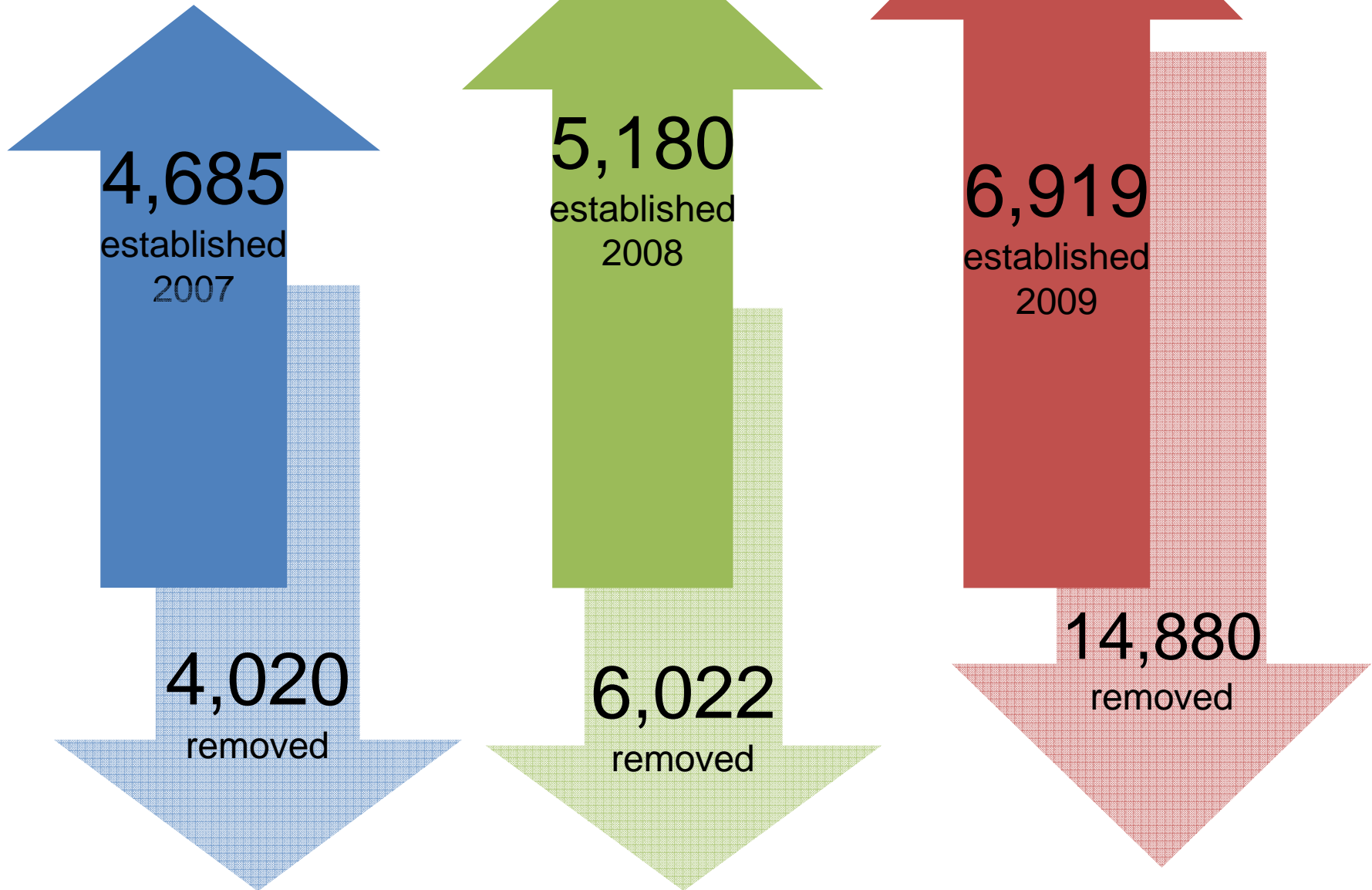


Will income change over the next 12 months?

Charity Commission
recession survey, August
2009 (D/Ks excluded)



Some of the increase is still driven by new establishments

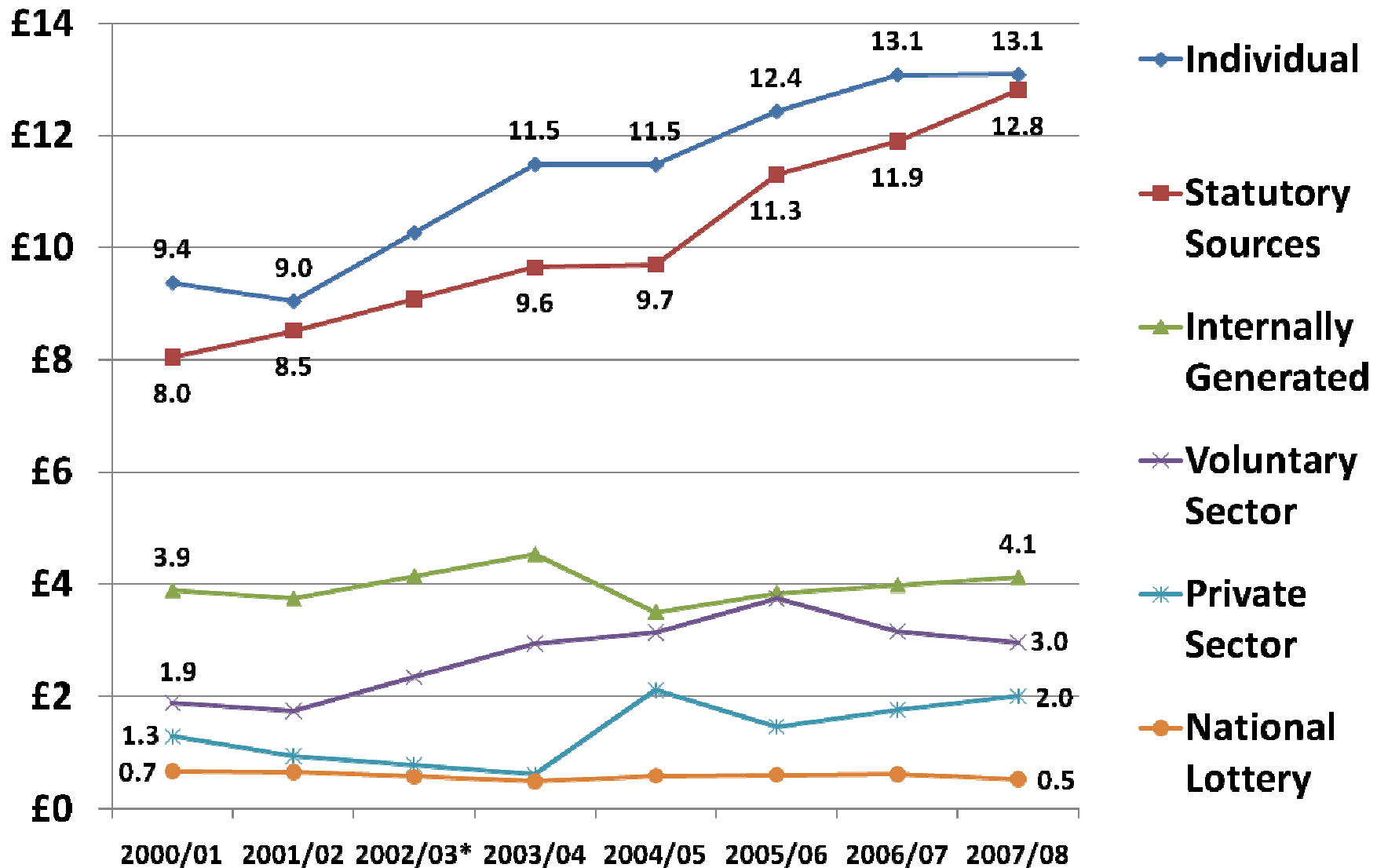


Reflections #1

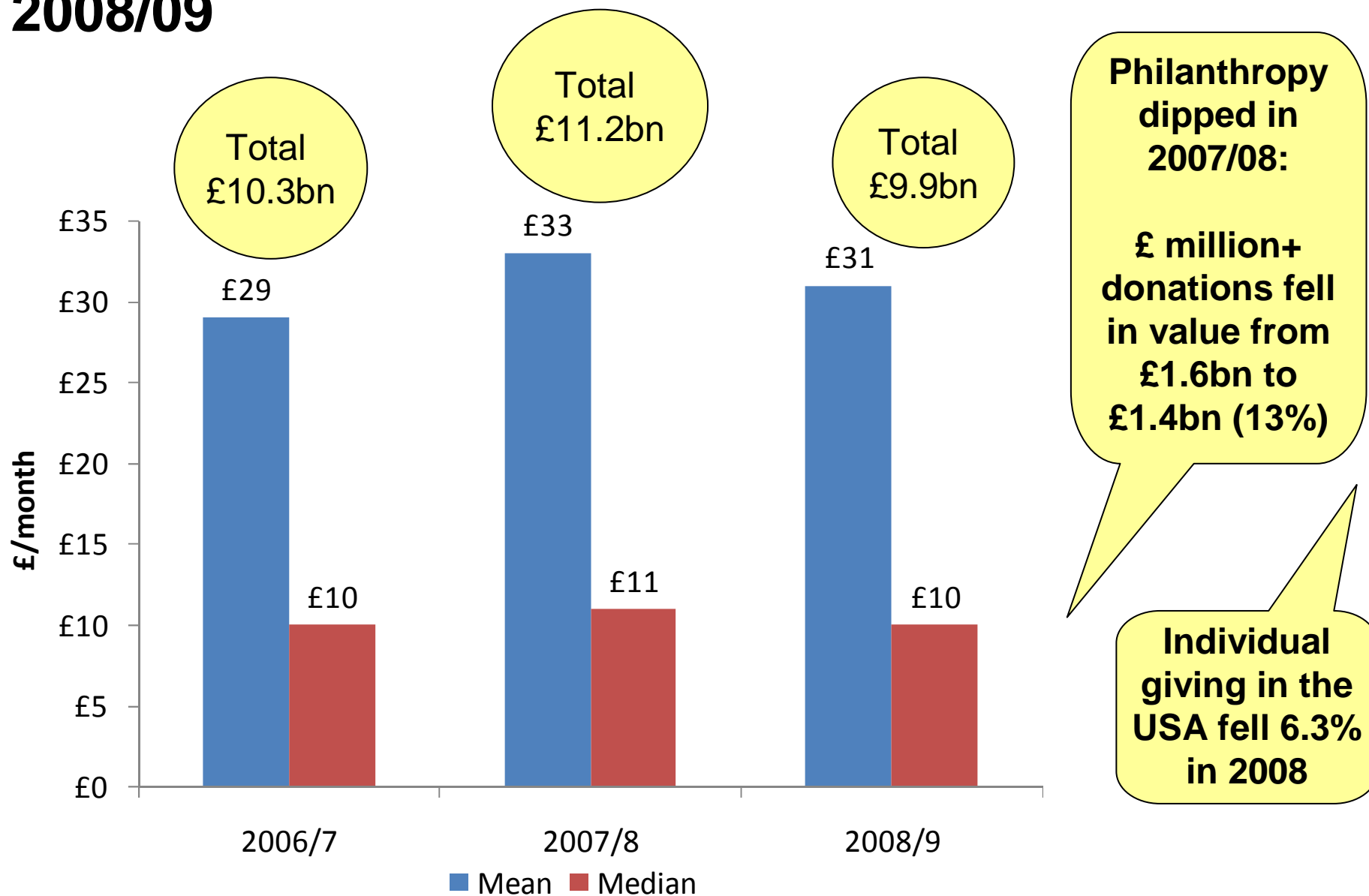
- The sector is still growing
- Competition for funds has not been diminished by widespread merger/closure
- Grant-makers most widely perceived as a future income opportunity

2. What is driving change in aggregate funding?

How to grow by £10bn: donors + delivery

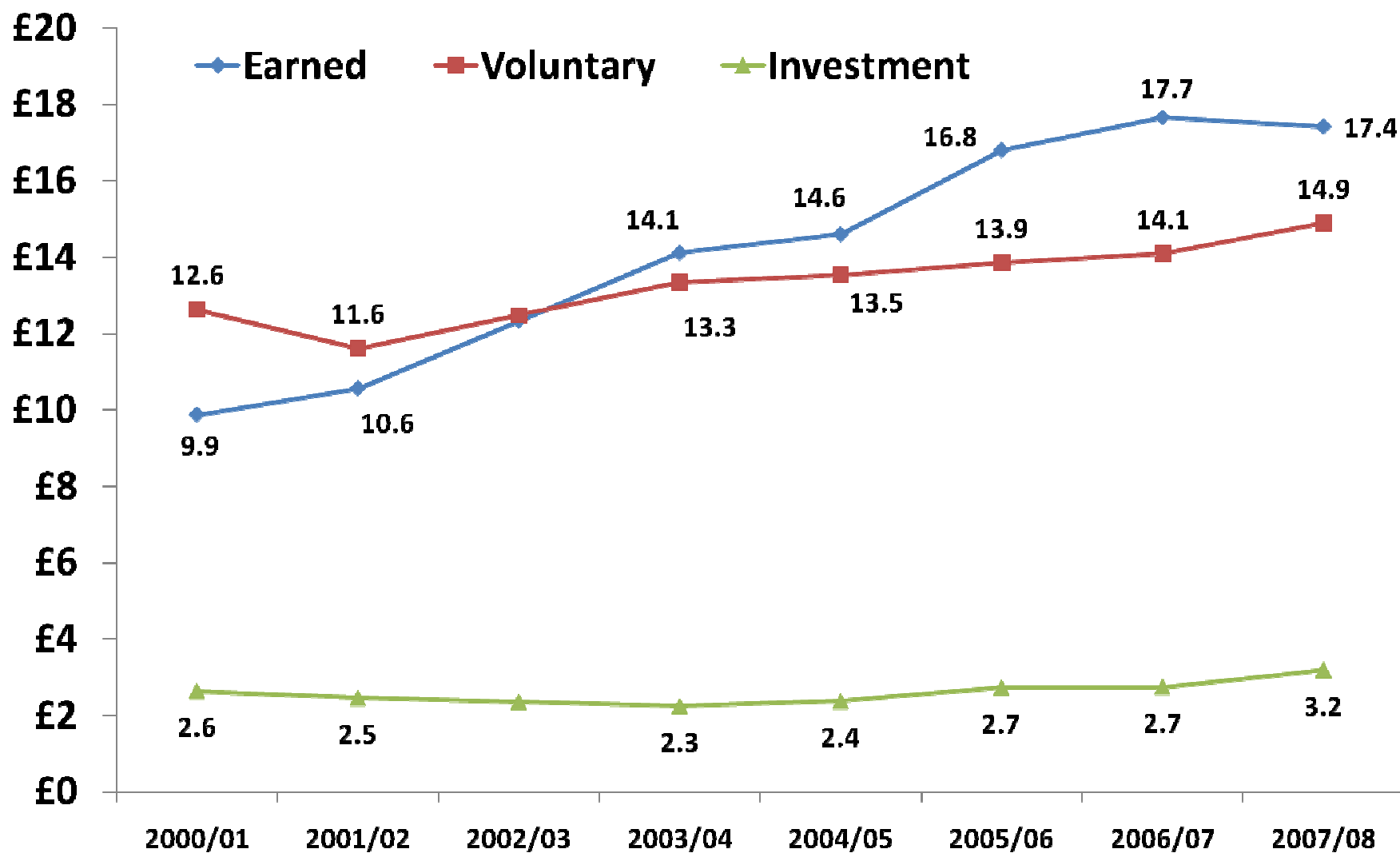


Though charitable giving dipped by 11% in 2008/09

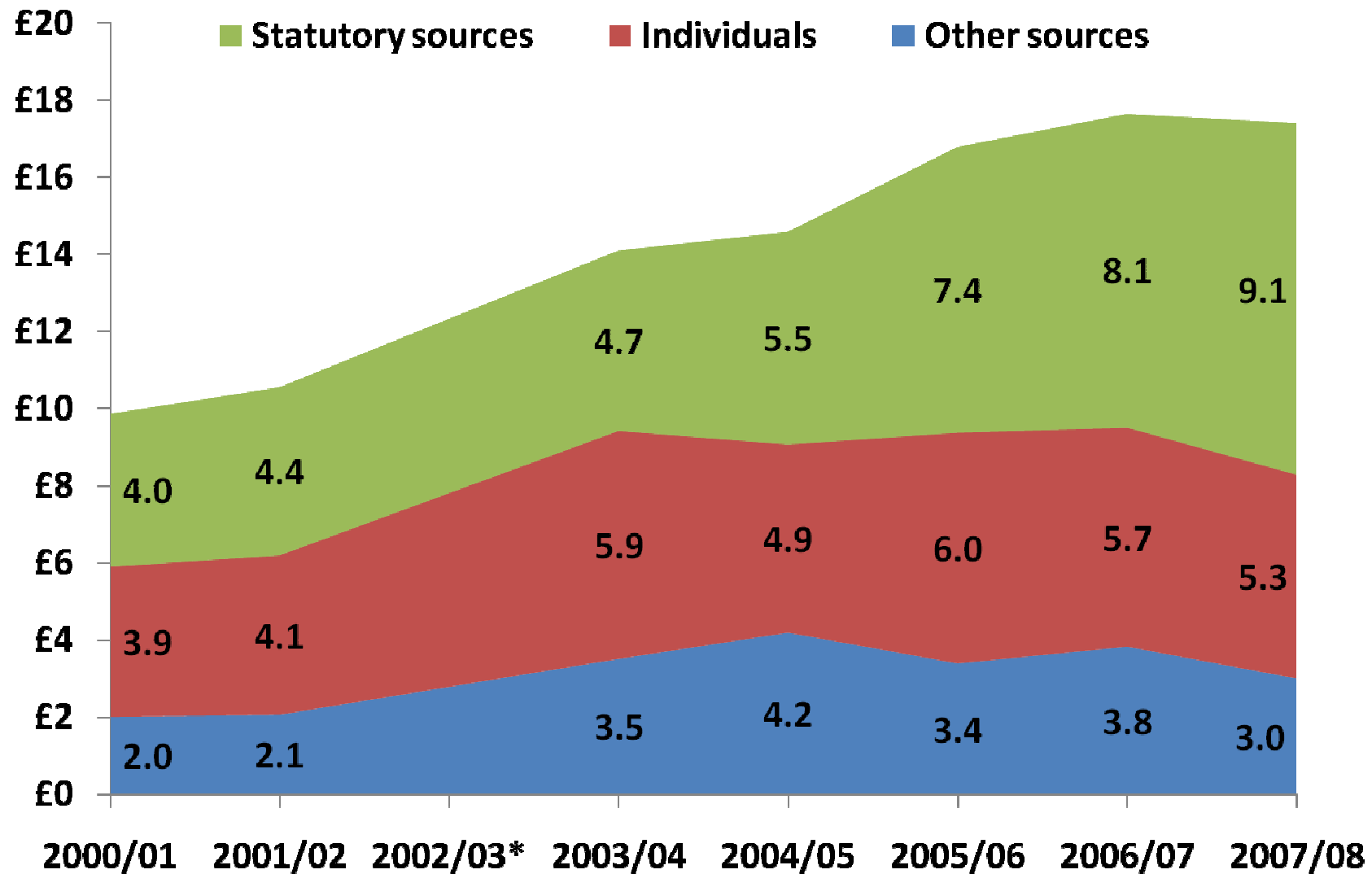


Source: CAF/NCVO

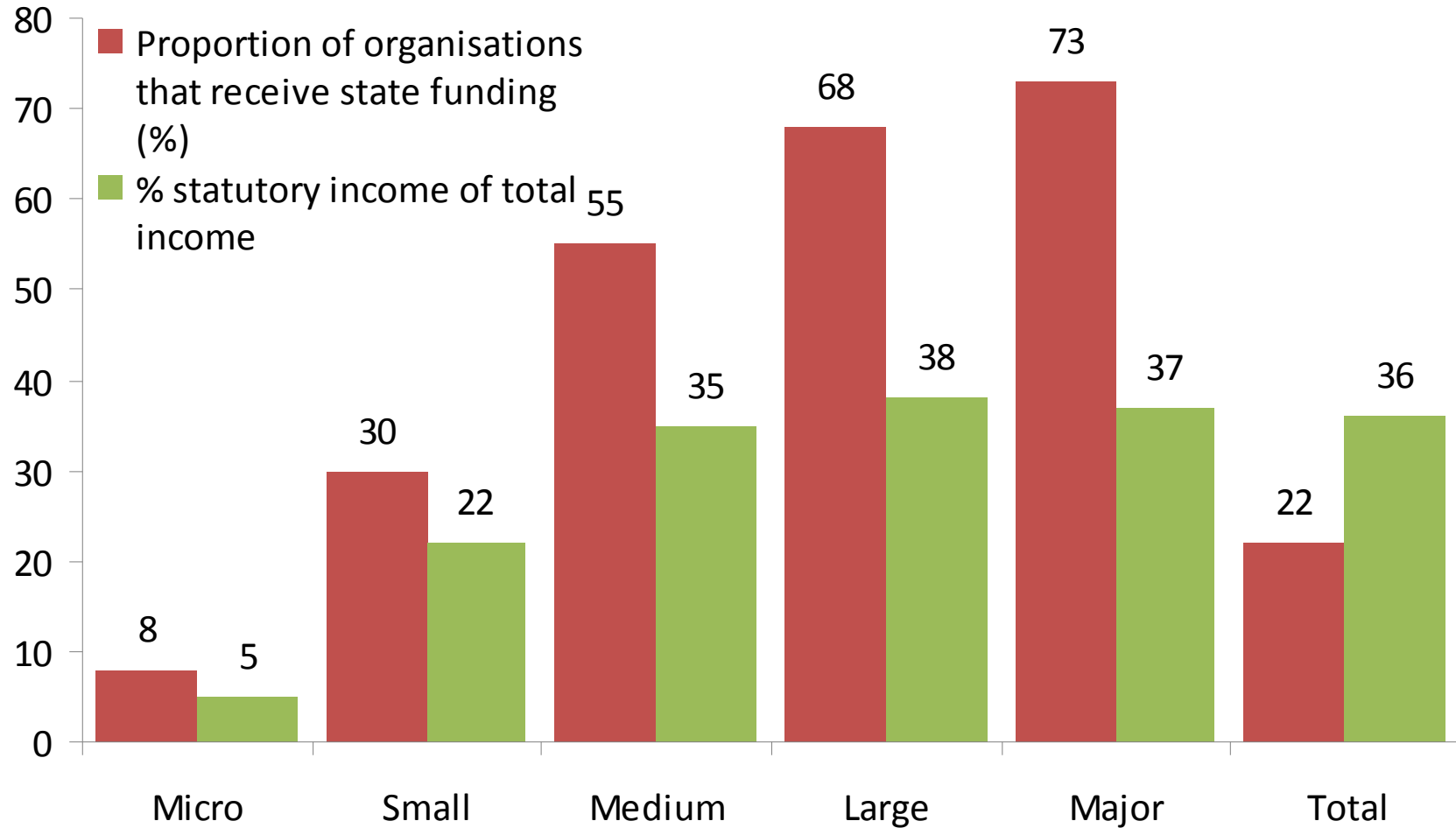
Earned income



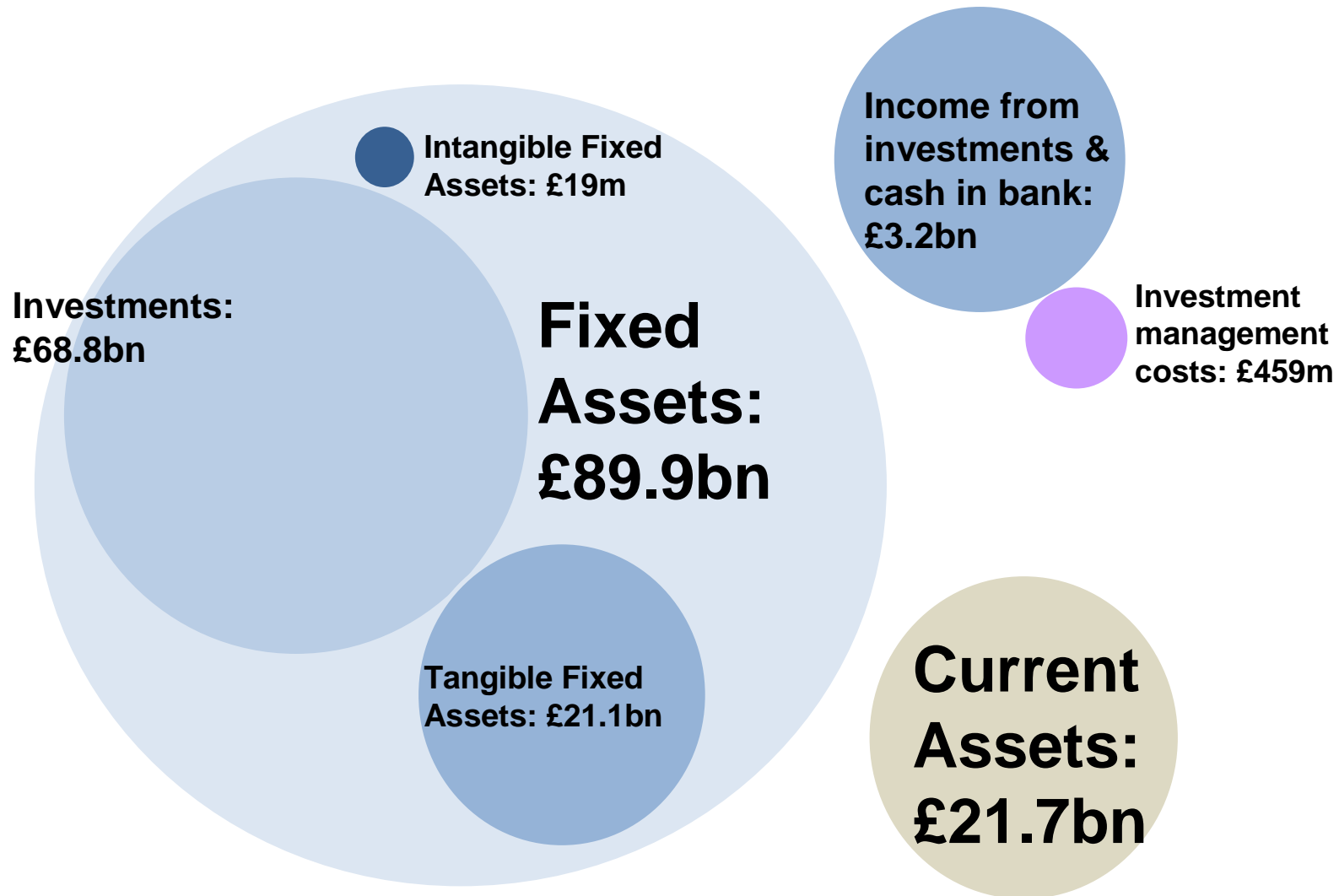
Earned income only: contracts are driving growth, not sales to people/other sectors



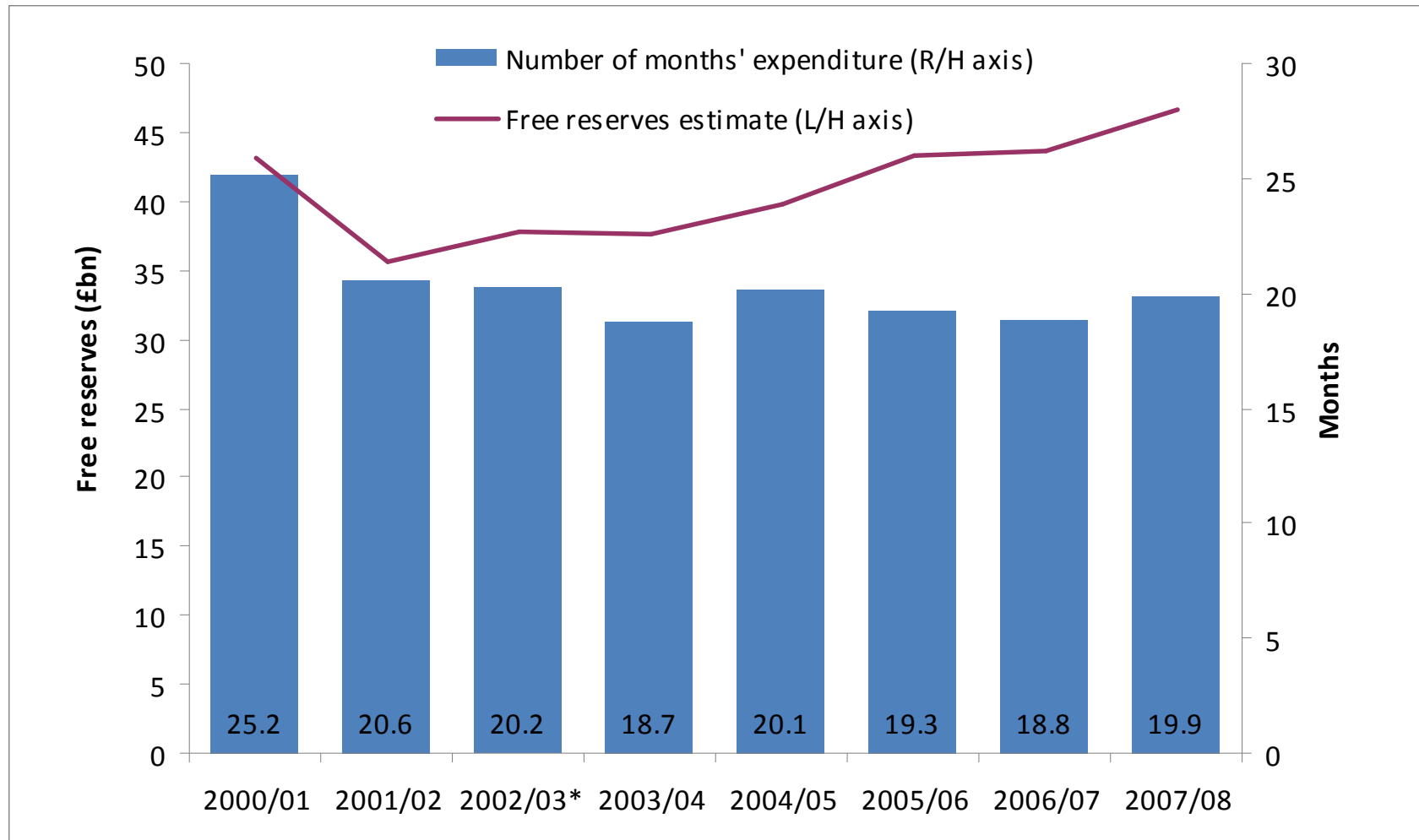
Statutory income = £12.8 billion



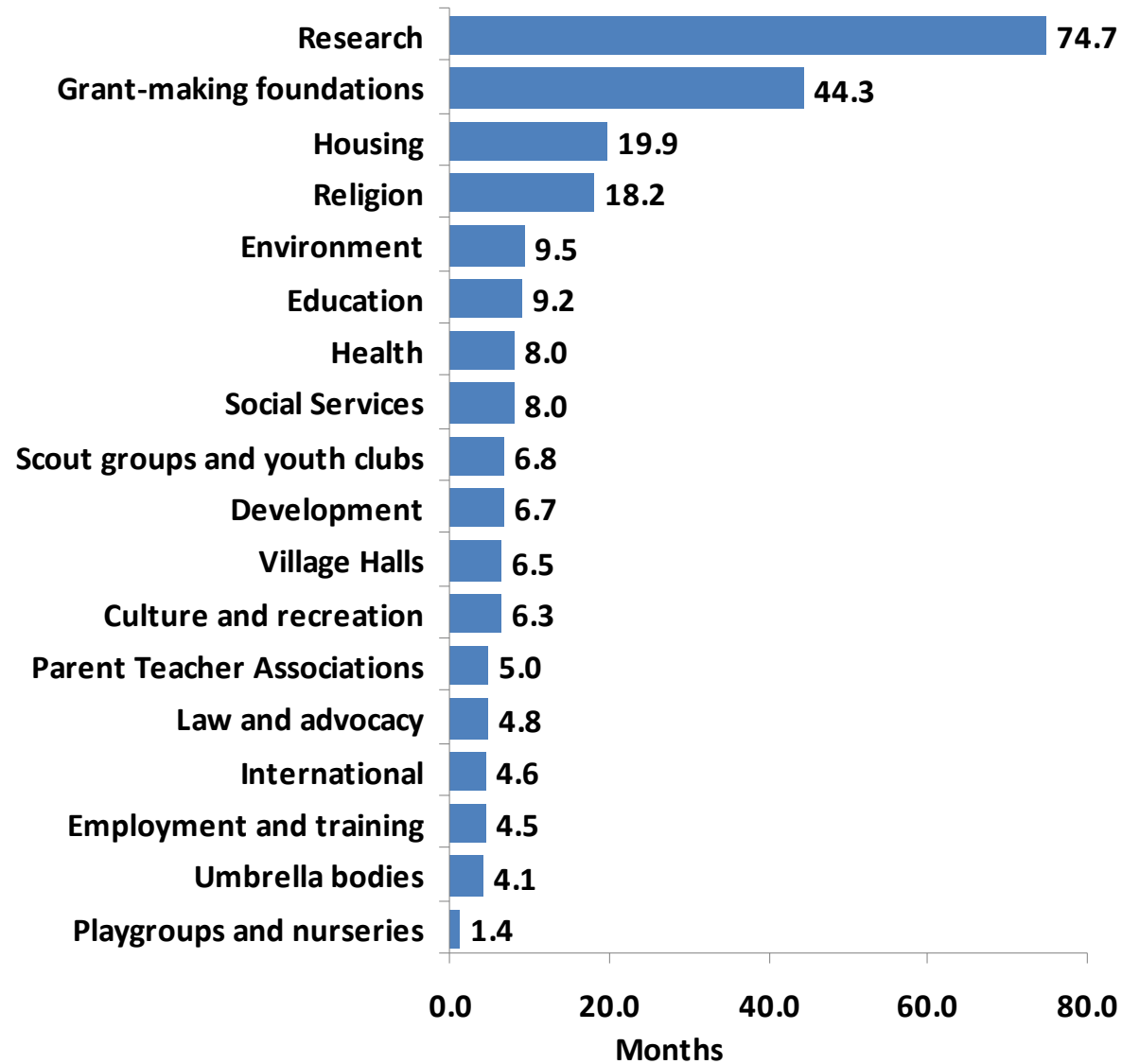
Can we invest to generate more income?



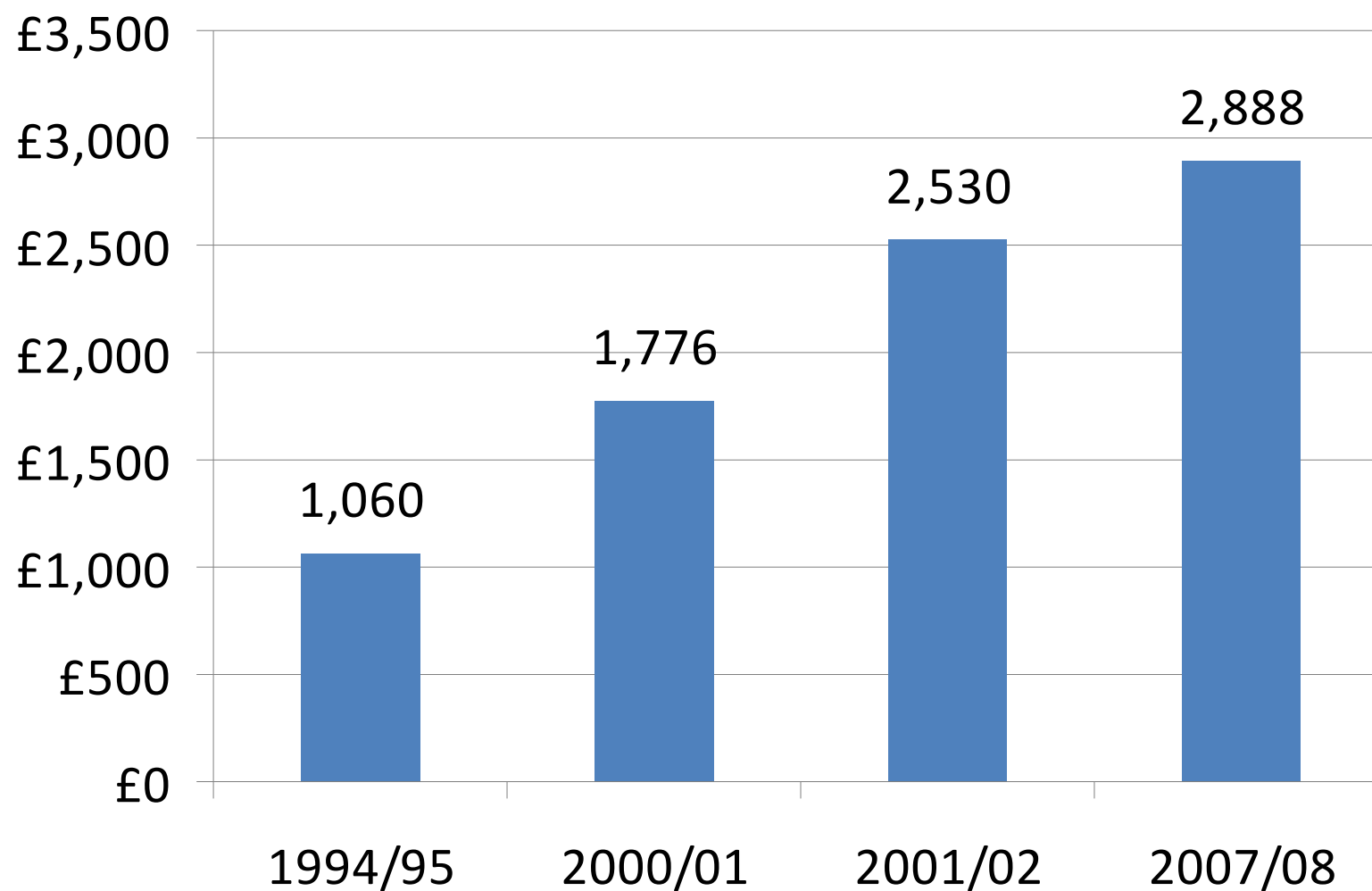
Reserves



Reserves



Loan finance



Reflections #2


- If statutory income growth reverses, are individual donations realistically the only large-scale alternative?
- If the organisations continue to grow in number, will the ‘minor’ sources grow with them?
- It’s difficult to ignore statutory fee income and its dominance of the funding landscape
- And what of prospects for earning income other than from the commissioners?

3. How is this aggregate funding shared-out?

91,000 micro organisations

 Income: £264m

Income: £26.9 billion

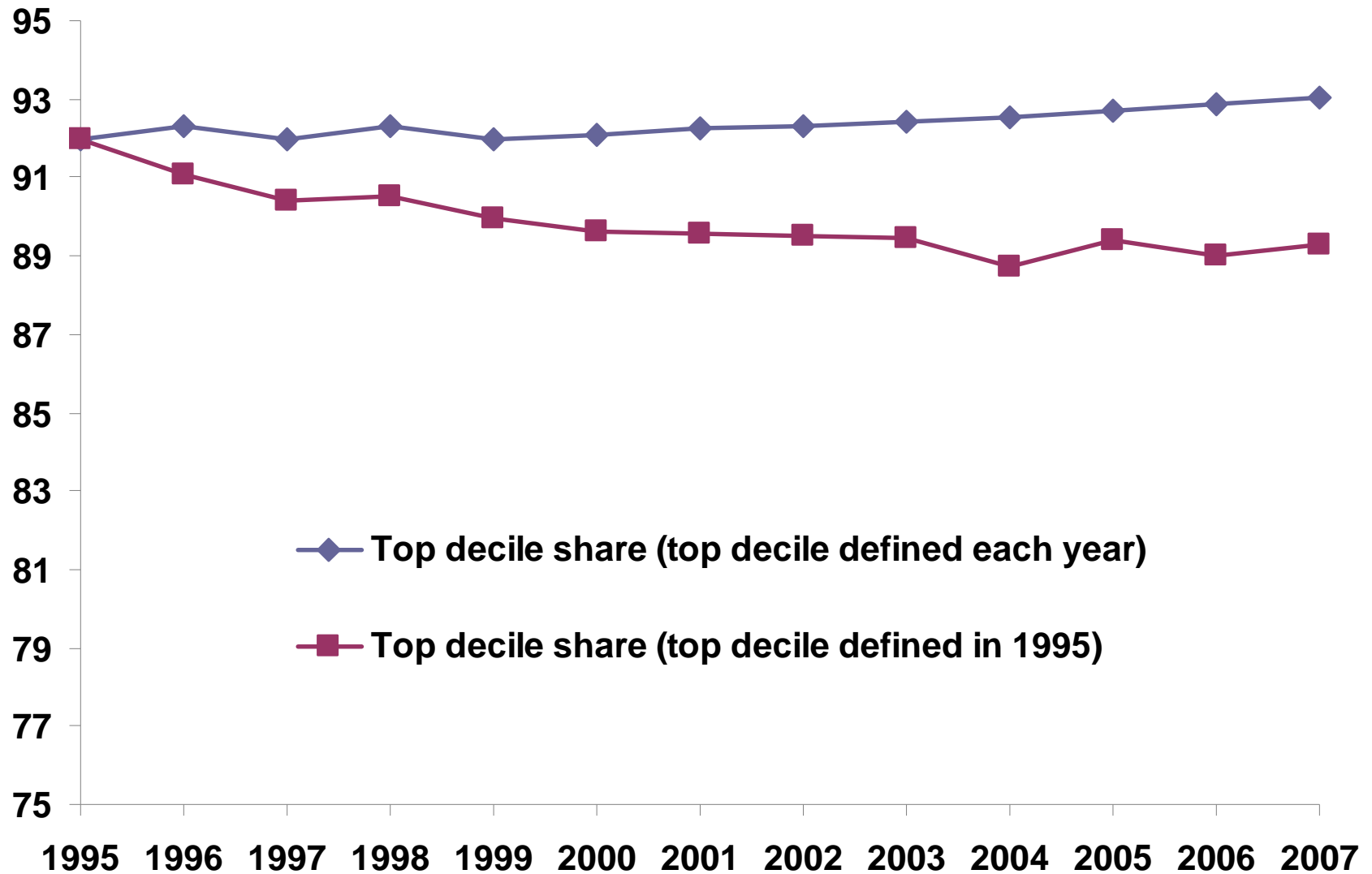
 4,566 major organisations

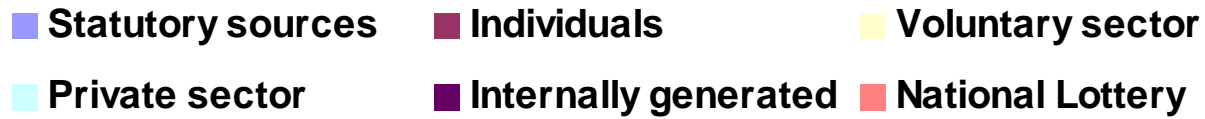
**75,000 small/
medium
organisations**

**Income:
£8.4 billion**

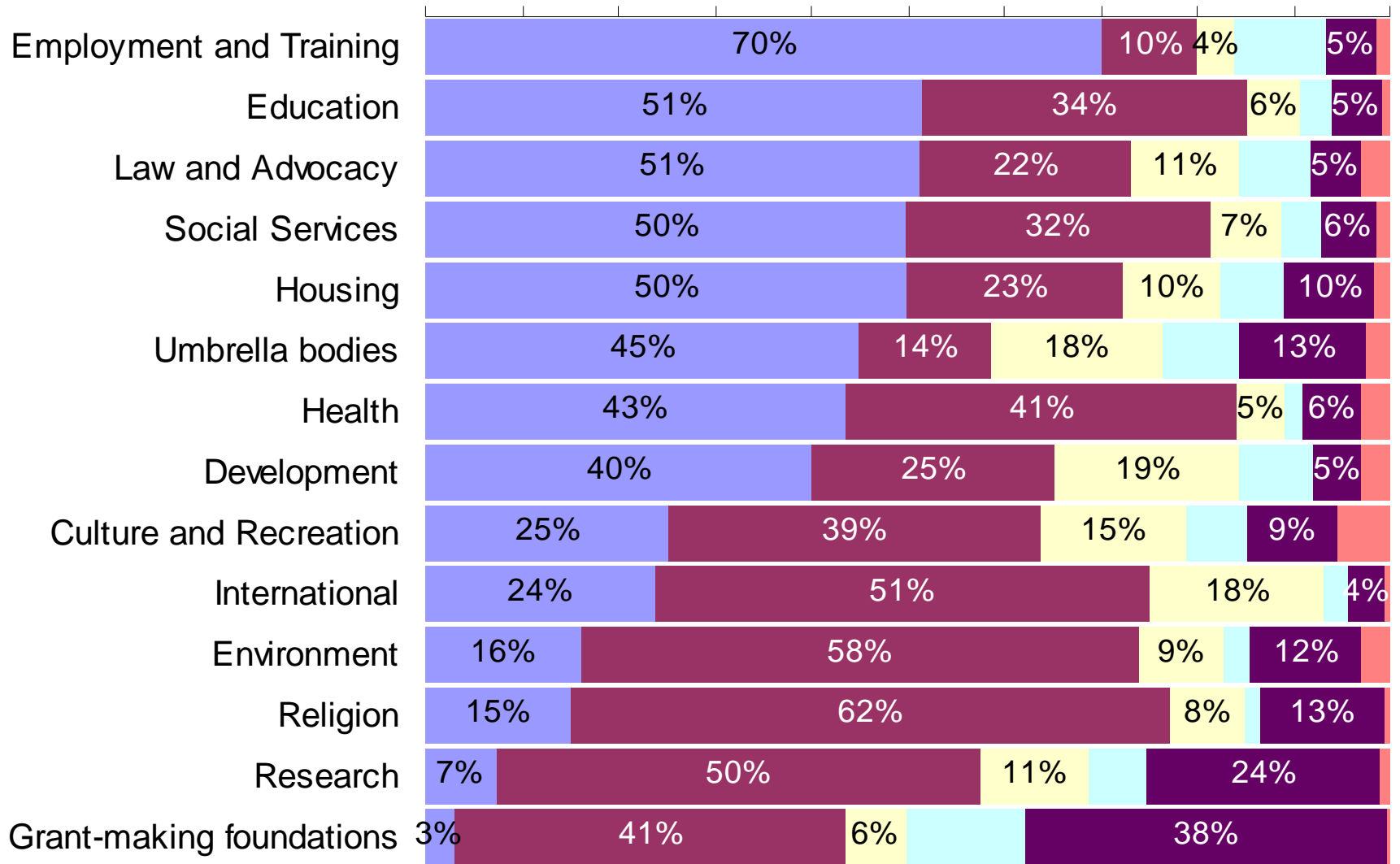
**Income is heavily
skewed to the few...**

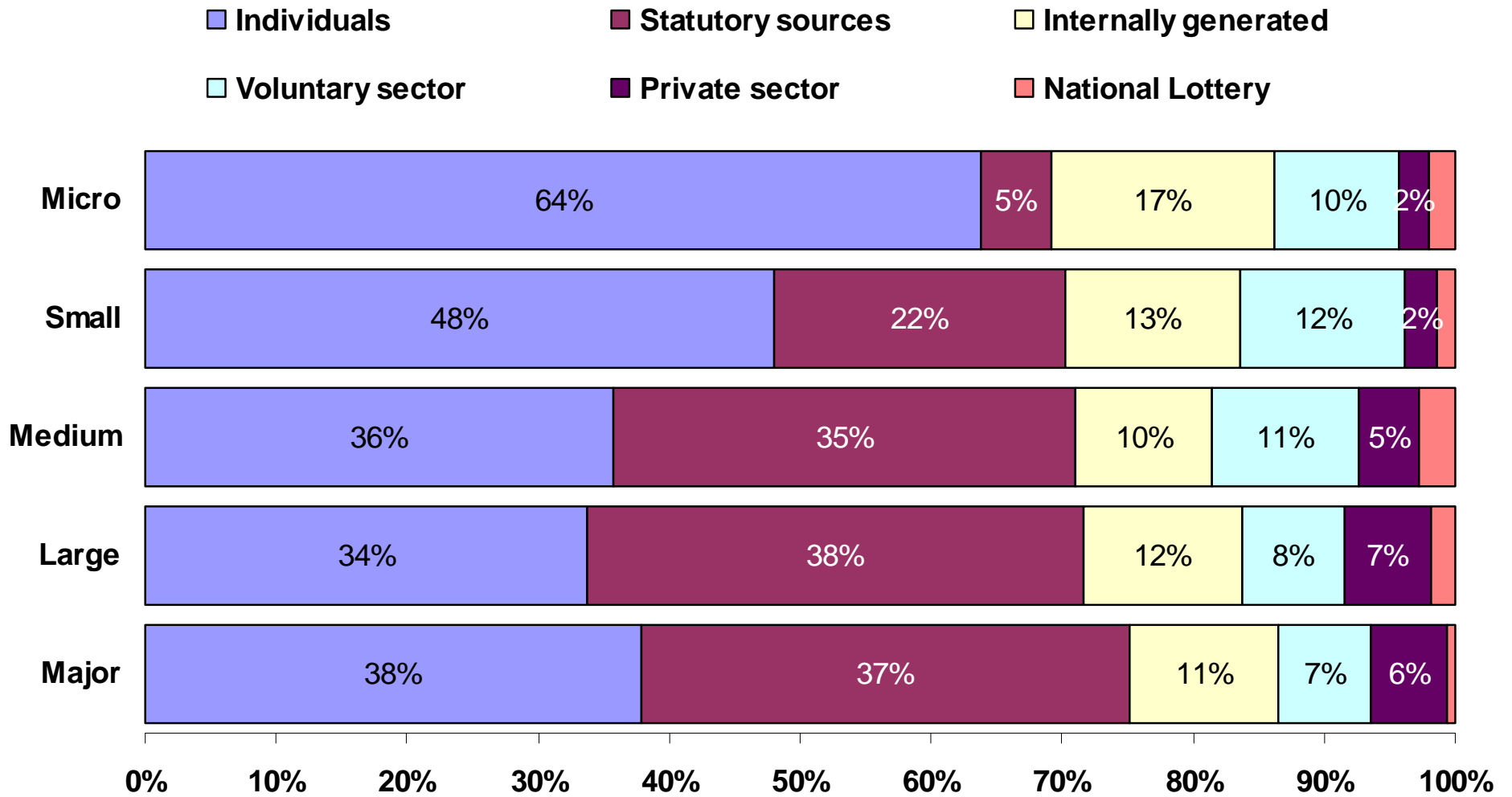
But evidence might suggest that this is not getting any worse...





0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%





Reflections #3

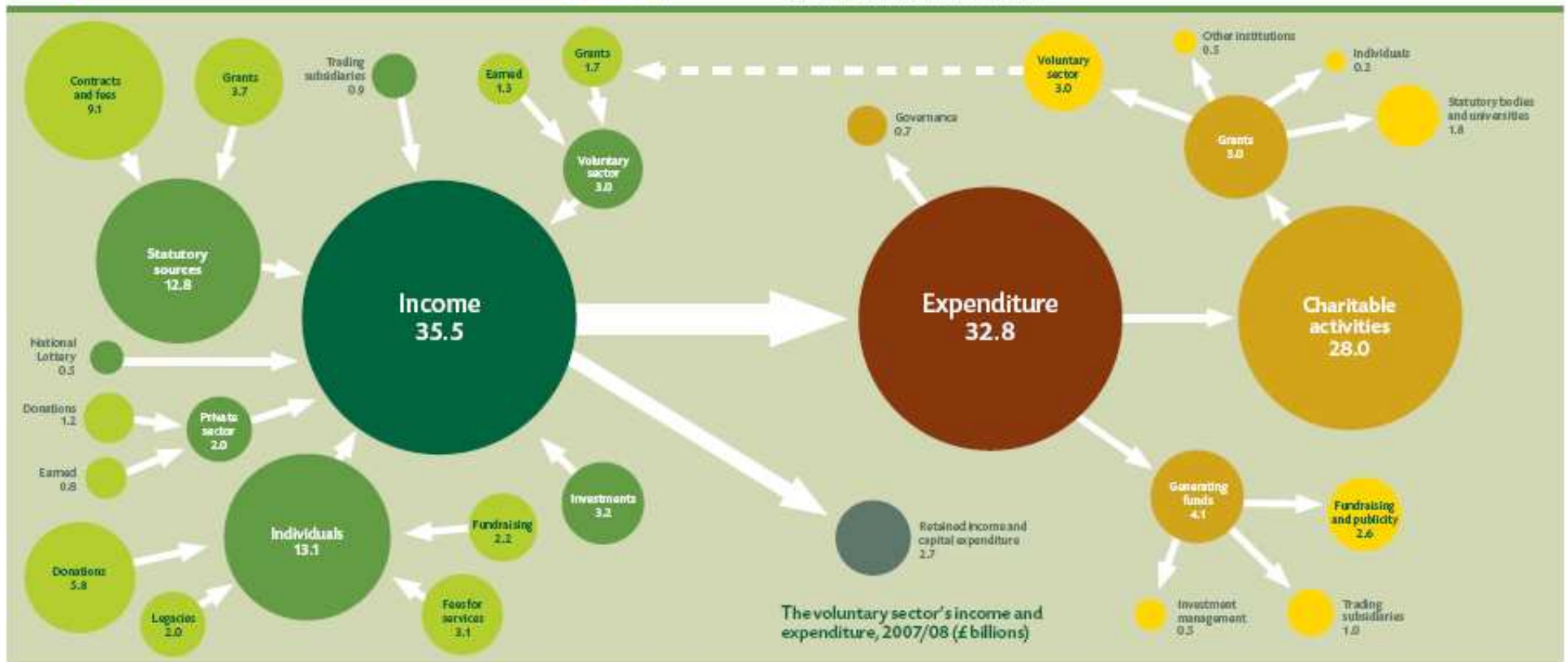
- All formal resources – income, assets, workforce – are heavily skewed towards the largest
- Although the public give more to large charities, micro/small organisations rely more on charitable donations
- Driving-up charitable giving in itself might not help these?

Question 13...

What is the voluntary sector's total income and expenditure?

£32.8 BILLION

Total current expenditure of the voluntary sector¹



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