

## Pro Bono Economics/Civil Society Media results: 5 & 6 May 2020

*Our weekly survey is designed to take the temperature of the civil society sector as the Covid-19 crisis continues to unfold, monitoring the pressures being faced by charities and voluntary organisations across the country and understanding how the picture is changing over time.*

Over the course of 5 & 6 May 2020, a total of 126 respondents filled in the survey. The results showed:

- 94 per cent said they expected Covid-19 to have a negative impact on their ability to meet their charity objectives over the next six months, with half (50 per cent) saying they expected it to be a “large” negative.
- Nearly half (46 per cent) said their level of concern was broadly unchanged over the past seven days, but 52 per cent said that their expectations had deteriorated – with 15 per cent saying their level of concern had increased “a lot”.
- Nearly half (48 per cent) said the single biggest issue they were facing was the impact of social distancing on their ability to deliver their services. Just over one-in-five (22 per cent) said that the way in which Covid-19 had affected their ability to fundraise was the biggest challenge. Just under one-in-five (18 per cent) pointed instead to its effect on their ability to plan ahead.
- Nearly all (96 per cent) of the respondents said they’d taken some form of action in response to the financial challenges raised by the crisis. The most cited response was the furloughing of staff and use of the government’s Job Retention Scheme, with 61 per cent of respondents saying they’d done this. A slightly lower proportion (56 per cent) said they’d reduced their activity in a significant way. Just over half (52 per cent) said they’d sought funder flexibility on their spending plans, project delivery and reporting requirements. More than two-in-five (44 per cent) said they had drawn down on their financial reserves. Nearly one-in-four (23 per cent) said they’d applied for support from the government’s £750 million charity-specific package.
- When asked to rate the sufficiency of the government’s financial support for civil society in the face of Covid-19 (where 1 = entirely insufficient and 10 = entirely sufficient), the average score across all respondents was 4.5. One-in-three (68 per cent) scored the response at five or below, with two-in-five (40 per cent) scoring it 1-3 and one-in-ten (9 per cent) scoring it 8-10.
- There were indications of some important differences by size of charity, though modest sample sizes mean any conclusions must be drawn with caution.
  - Smaller (annual income of less than £500k) and medium sized (annual income between £500k and £10m) charities were more likely than large (annual income of £10m+) charities to say Covid-19 was having a negative impact on their ability to meet their objectives.
  - Small and medium charities were also more likely to cite the impact of social distancing on their ability to deliver services as being the single biggest challenge they are facing (59 per cent and 47 per cent respectively); whereas large charities were most likely to cite fundraising issues as the single biggest challenge (54 per cent).
  - Small charities (38 per cent) were much less likely than either medium (71 per cent) or large (77 per cent) charities to say they’d furloughed staff.

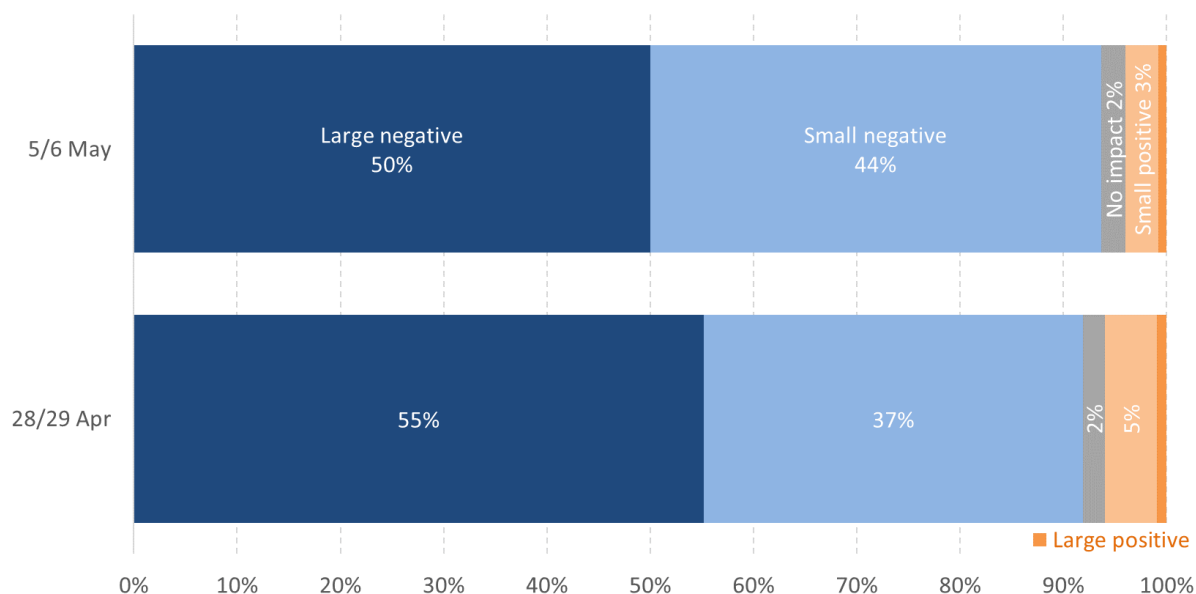
Commenting on the findings Matt Whittaker, Chief Executive of Pro Bono Economics, said:

*“The charity sector is accustomed to working under pressure, but these latest results highlight the many additional difficulties organisations are now having to deal with as a matter of course. The landscape has changed dramatically and there is little sign that the challenges are going to ease: rather, more than half of our survey respondents say they’ve grown more pessimistic about the coming six months over the last week.*

*The overriding message from this week’s survey, and in particular from the comments made by respondents, is one of concern about the incompleteness of the government’s support for the sector. Many organisations say they are falling through the cracks, and that their long-term survival is under threat. Smaller charities feel that financial support is only being channelled to larger organisations; while larger charities say that there is a disproportionate – if understandable – focus on front-line services dealing directly with the COVID-19 crisis.*

*If we want the sector to continue to be able to make the vital contribution that it does to society – and indeed meet rising levels of demand for charitable support – then it is clear that more financial support is required.”*

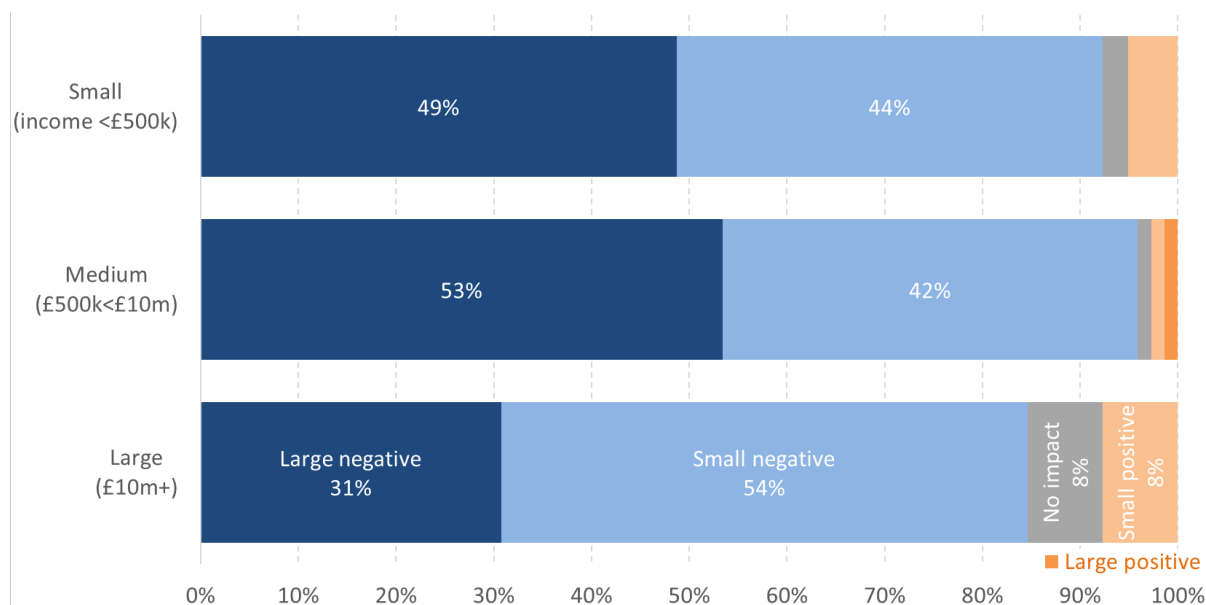
Figure 1: How do you expect Covid-19 to affect your charity's ability to deliver on its objectives in the next six months?



Notes: 28/29 Apr = 433 responses. 5/6 May = 126 responses.

Source: Charity responses to PBE & Civil Society Media survey.

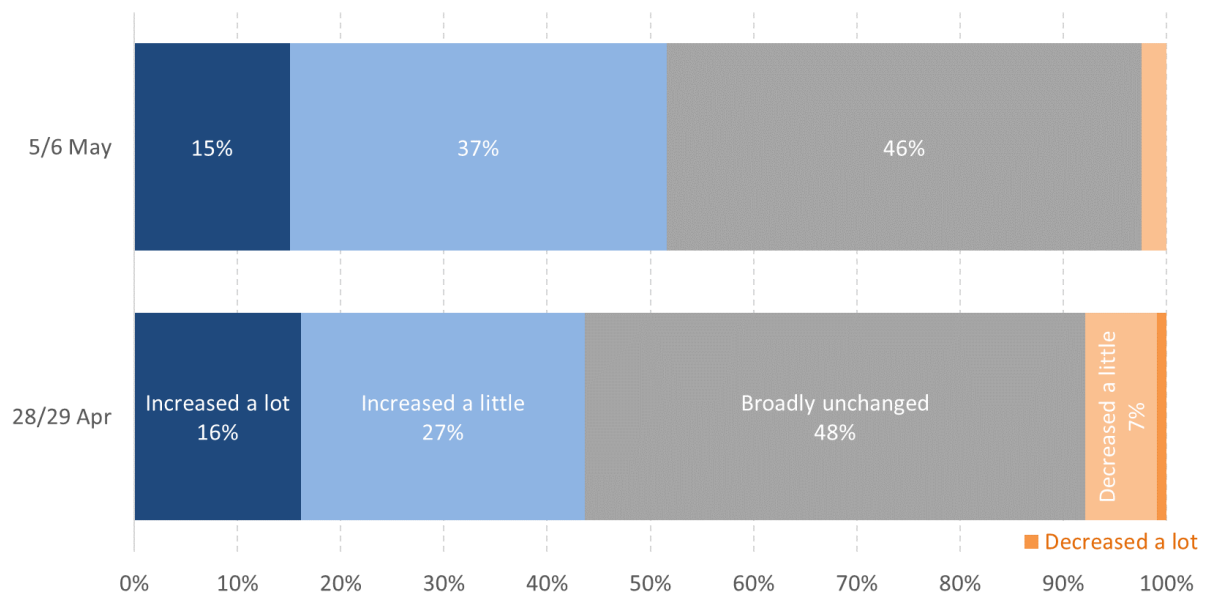
Figure 2: How do you expect Covid-19 to affect your charity's ability to deliver on its objectives in the next six months? 5-6 May, by charity size



Notes: 126 responses, comprising 39 'small', 73 'medium' and 13 'large'. Modest sample sizes mean these breakdowns should be treated with caution.

Source: Charity responses to PBE & Civil Society Media survey.

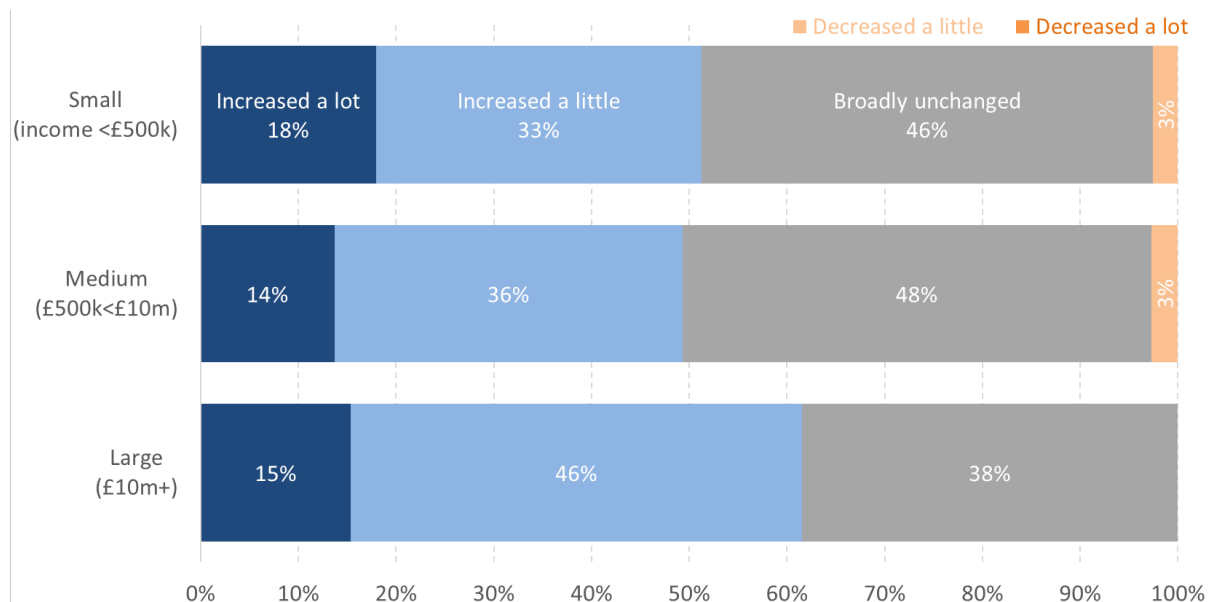
Figure 3: How has your level of concern about Covid-19's impact on your charity's ability to deliver on its objectives changed over the last seven days?



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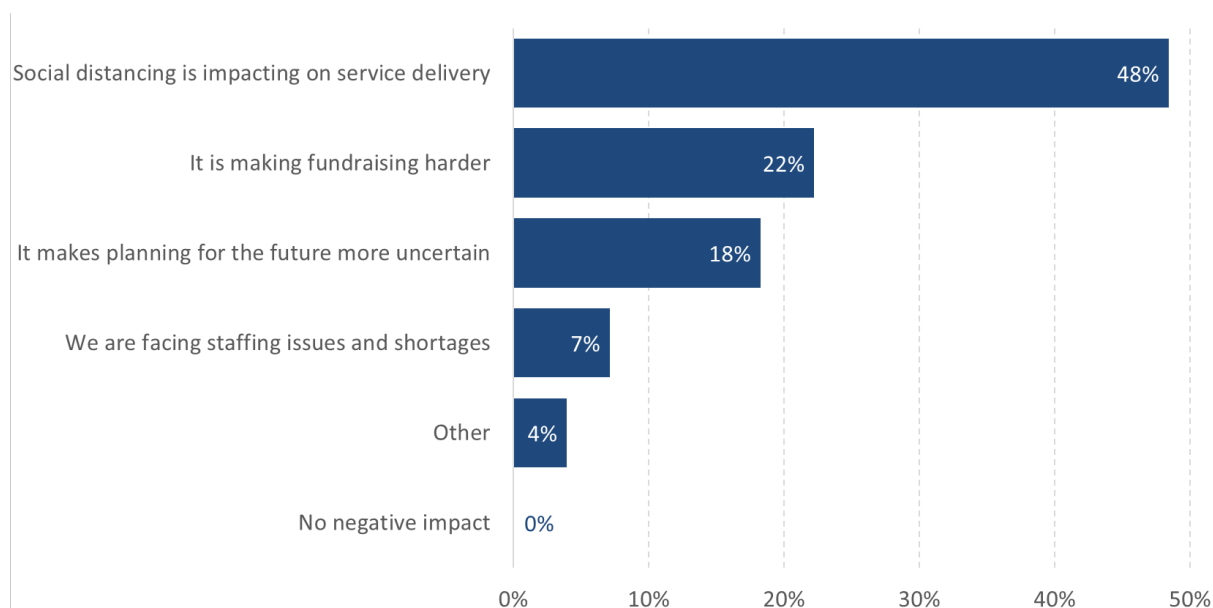
Figure 4: How has your level of concern about Covid-19's impact on your charity's ability to deliver on its objectives changed over the last seven days? 5-6 May, by charity size



Notes: 126 responses, comprising 39 'small', 73 'medium' and 13 'large'. Modest sample sizes mean these breakdowns should be treated with caution.

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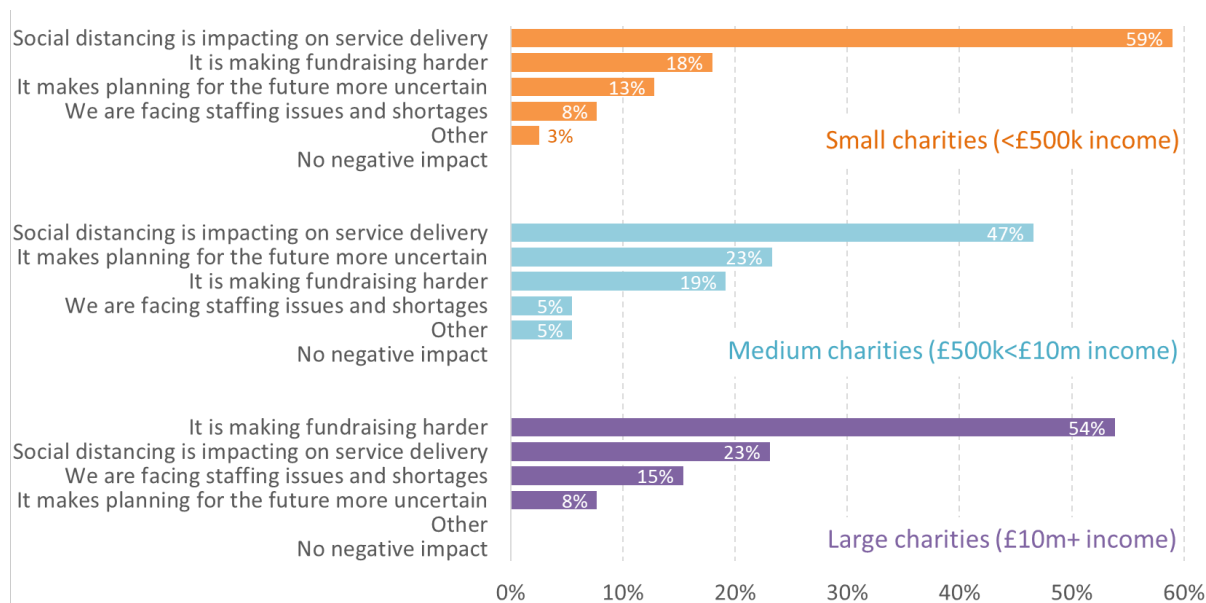
Figure 5: What is the current single biggest negative impact of Covid-19 on your charity's ability to deliver on its objectives? 5-6 May



Notes: 126 responses.

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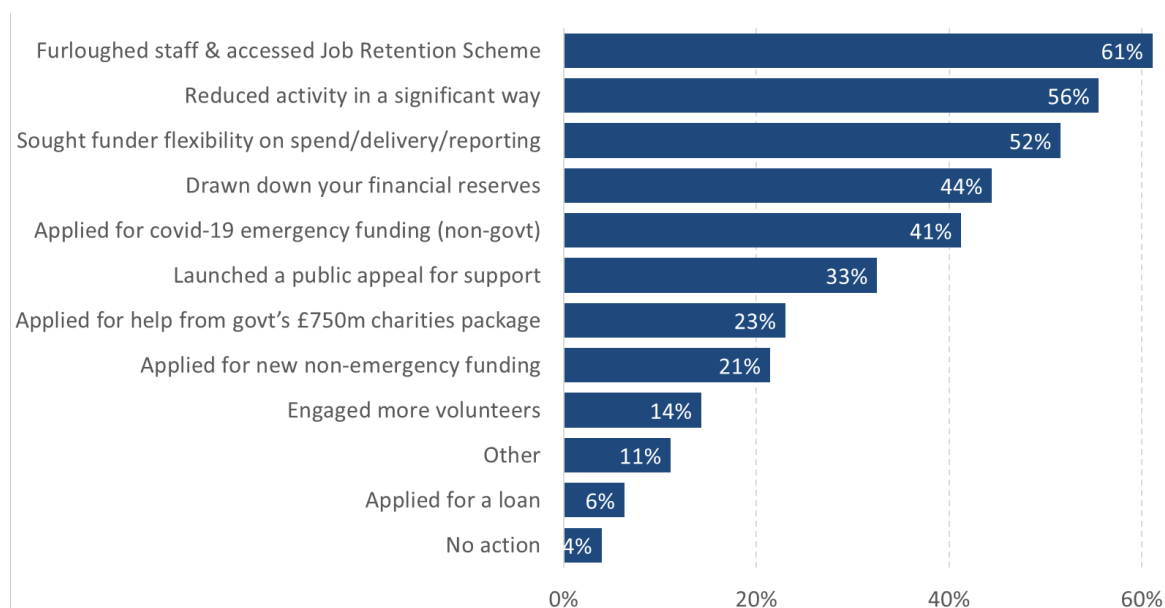
Figure 6: What is the current single biggest negative impact of Covid-19 on your charity's ability to deliver on its objectives? 5-6 May, by size of charity



Notes: 126 responses, comprising 39 'small', 73 'medium' and 13 'large'. Modest sample sizes mean these breakdowns should be treated with caution.

Source: Charity responses to PBE & Civil Society Media survey.

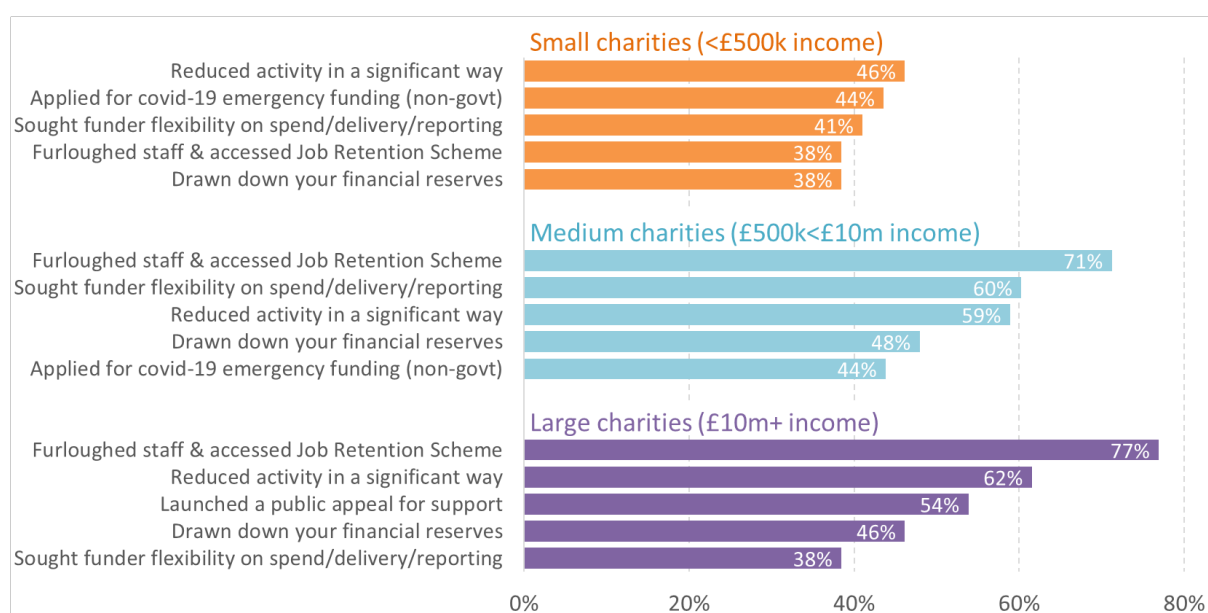
Figure 7: What actions have you taken in response to any financial challenges that Covid-19 have presented to your organisation? 5-6 May



Notes: 126 responses. Respondents were asked to tick all options that applied.

Source: Charity responses to PBE & Civil Society Media survey.

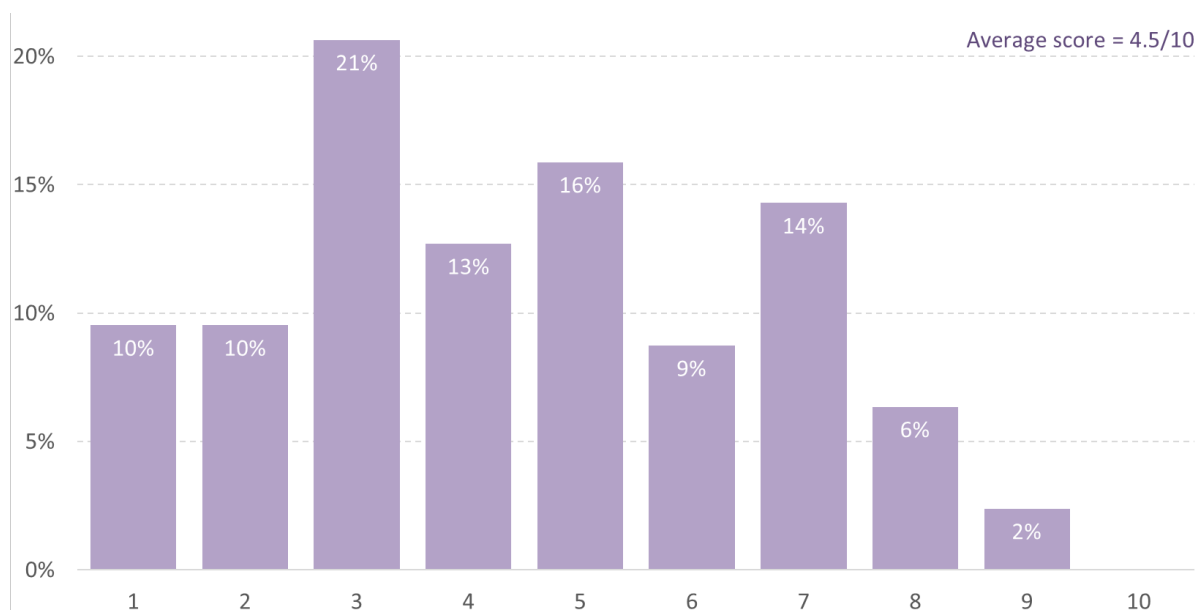
Figure 8: What actions have you taken in response to any financial challenges that Covid-19 have presented to your organisation? 5-6 May, by size of charity, top five shown



Notes: 126 responses, comprising 39 'small', 73 'medium' and 13 'large'. Modest sample sizes mean these breakdowns should be treated with caution. Respondents were asked to tick all options that applied.

Source: Charity responses to PBE & Civil Society Media survey.

Figure 9: On a scale of 1-10 (1="entirely insufficient"; 10="entirely sufficient") how would you score the Covid-19 financial help being provided to civil society by govt? 5-6 May



Notes: 126 responses.

Source: Charity responses to PBE & Civil Society Media survey.

Figure 10: Add your comment on what Covid-19 means to your organisation and what more the government, funders or others could be doing to support you: 5-6 May (selection)

I don't fit into any of the criteria for the £750m despite delivering services to older people

Massive uncertainty about whether we will be able to survive beyond the next six months

Unable to provide face to face service to our members

All the money is going to big charities - not the ones which will pick up the mess when all of this is over and we return to a normal pattern of life. We need funding for the social fall out

Because we are a medium sized charity with reserves it is hard to access gov finances i.e. no rate rebate as our rates are above the £55k threshold

Donors need to release restricted funds and make funding flexible

Allowing charities money they are entitled to rather than have to fight for. Funding should be on need not on time to compete

Larger charities are losing out on funding opportunities due to size/ funding restrictions imposed by those distributing the funds themselves

Support has been OK to a point but looking at a future with social distancing we expect many of our vulnerable clients will be unable to comply and so will see a long-term and deep reduction in any services intended to provide an improved quality of life and help with leading a more independent life

We fall between the cracks of most of the funding streams. We also think that demand for our services will increase as we come out of lockdown, and cannot see any funding to support that

£750m not aimed at all charities - either hospices, Citizens Advice or domestic large charities or small charities

Clarity of message regarding who can work and who can't. Clarity over what constitutes safe working i.e. can you carry out lone working if you are not a key worker and your work is not essential?

Notes: 126 responses.

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