State of the Sector Survey 2024

About the survey

The State of the Sector survey was developed by Wessex Community Action (WCA), the Council for Voluntary Service (CVS) for Wiltshire. The aims of the survey were to:

- Develop a greater understanding of the VCSE in Wiltshire
- Understand key challenges faced by the sector
- Build a picture of support needs of the sector
- Celebrate the successes of the sector

The eligible population for the survey was all VCSE organisations operating within Wiltshire. The survey was hosted online and accessible via a link. This was publicised via the Wessex Community Action Newsletter and WCA hosted networks/forums as well as through partners. The survey was open from Monday 20 May 2024 until Monday July 1 2024. Responses were anonymous as it was felt this would best enable respondents to provide honest feedback. We received 51 responses in total.

Executive Summary

One of the key features of the VCSE is the diversity of the sector. This has been reflected in the wide-range of groups and organisations who have responded to the survey, both in terms of size and activities carried out.

A number of key themes emerged across the range of respondents to the survey. Rising demand was one such common experience with over three quarters of respondents reporting that demand had increased over the last 12 months. When it comes to capacity to meet demand there is currently little headroom. For 55% of respondents the expectation was that over the next 12 months demand would be met with limited, or no spare capacity whilst 37% expected to almost meet demand, or fall significantly short. In some cases complexity is also increasing, 24% respondents cited increasing complexity of need as a significant challenge.

The centrality of volunteers to much of the local sector was another common theme. Across the survey there was evidence that volunteers are key to the sector, playing roles from leadership to service delivery as well as providing a connection to local communities and a values-led approach. Almost all groups were supported by regular volunteers and 45% of responses came from organisations which had no paid staff.

Recruiting volunteers provided a challenge common to many of the respondents with 63% reporting experiencing difficulty recruiting volunteers in the past 12 months and over a quarter highlighting volunteer recruitment as a 'significant challenge' facing their organisation. For the organisations who employed paid staff 50% reported experiencing difficulty in recruitment over the past 12 months.

The impact of these challenges around volunteer, staff and trustee recruitment has been to limit capacity whilst also increasing the strain on those members of organisations leading to concerns of burn-out.

Issues around funding and income were a common theme. 59% of respondents to the survey cited income as a challenge and 46% of those responding to the question 'What two things would make the biggest difference to your organisation' pointed to funding. In an environment of increasing demand and

increasing complexity of need there is a need for funding to increase capacity and to enable organisations to develop.

When it came to the strengths and achievements of the sector volunteers, the relationship with the community, commitment and the delivery of services were themes which came up repeatedly. This spoke of a sector which was intrinsically linked to its communities, is determined, resilient and proud of its achievement in continuing to deliver services and meet needs in the face of challenges.

Types of organisation

What is the legal form of your organisation?

Charitable Incorporated Organisation (CIO)	24
Charitable Company (limited by guarantee)	12
Community Interest Company (CIC)	4
Unincorporated Association	3
Charity (other/ not specified)	3
Trust	3
Other	1

What geographical area does your organisation cover?

Local area	27
Wiltshire	17
Regional	4
National	3
International	0

Area of work

Respondents were asked to describe their area of work by selecting a code from a pre-determined list. This list was based on the International Classification of Non-profit Organisations (ICNPO) classification utilised by the NCVO Almanac.

The largest category was 'Social services' this includes family services, services for the elderly, temporary shelters, refugee assistance, income support and maintenance. This is consistent with the NCVO almanac where the social services category also accounts for the greatest number of organisations nationally[1].

Which of the following best describes your organisations area of work?

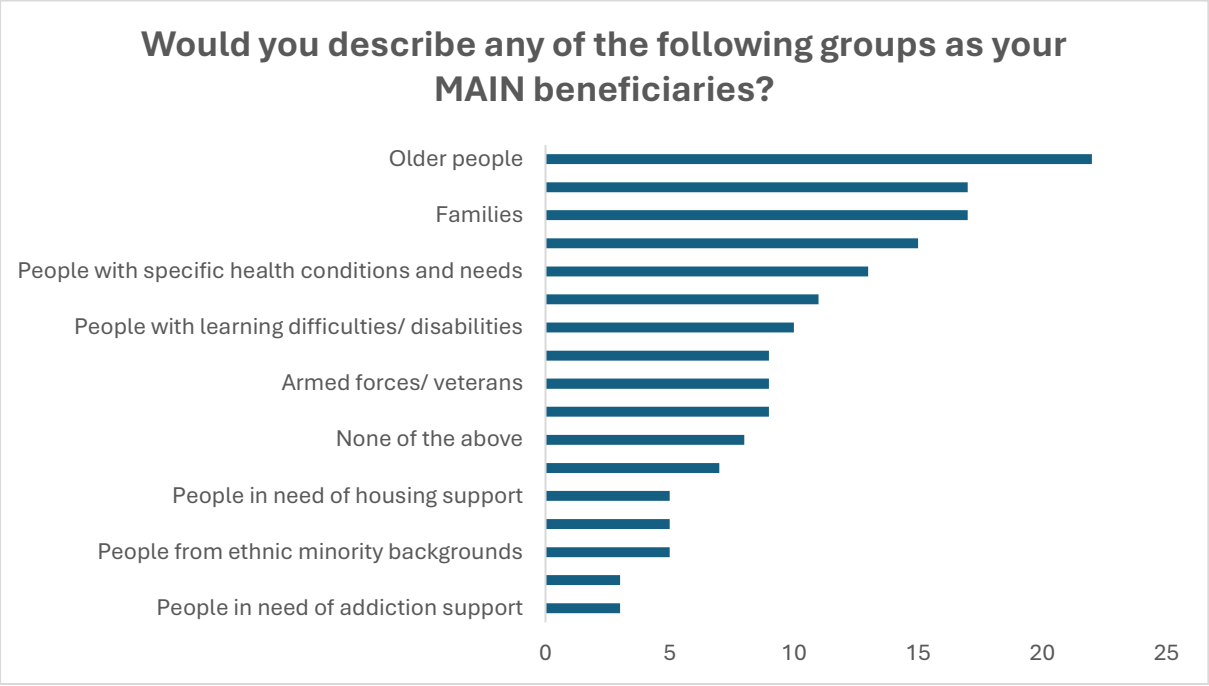
Social services	15
Health	9
Village Halls	6
Culture and recreation	5
Development	3
Environment	3
Religion	3
Scout groups and youth clubs	2
Umbrella bodies	1
Education	1

Would you describe any of the following groups as your MAIN beneficiaries?

Older people	22
People experiencing mental health issues	17
Families	17
Children and young people	15

[1] https://www.ncvo.org.uk/news-and-insights/news-index/uk-civil-society-almanac-2023/profile/what-do-voluntary-organisations-do/

People with specific health conditions and needs	13
People with physical disabilities	11
People with learning difficulties/ disabilities	10
Carers	9
Armed forces/ veterans	9
People who are unemployed	9
None of the above	8
Other charities or voluntary organisations	7
People from ethnic minority backgrounds	5
People who are from the LGBTQ+ community	5
People in need of housing support	5
People in need of addiction support	3
Offenders/ ex offenders	3



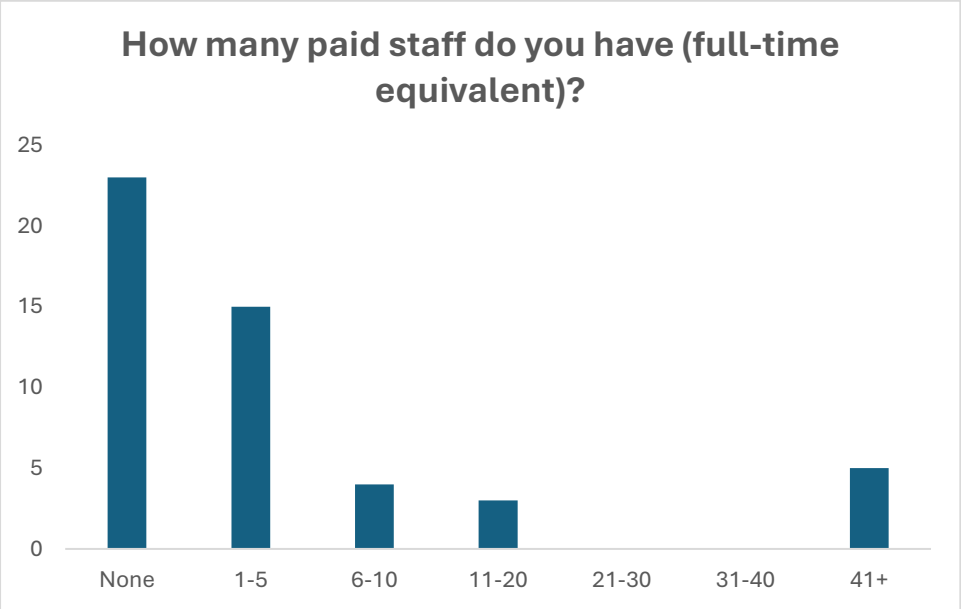
Staff and volunteers

We asked organisations how many paid staff they had (full-time equivalent).

23 respondents, accounting for 45% of total survey respondents, advised that they had no paid staff, with an additional 15 reporting that they have 1-5 paid staff, accounting for 29% of total survey respondents. In total almost three-quarters of organisations responding reported having five, or fewer paid staff. At the other end of the scale 5 organisations reported having 41+ paid staff, just under 10% of total survey respondents.

How many paid staff do you have (full time equivalent)?

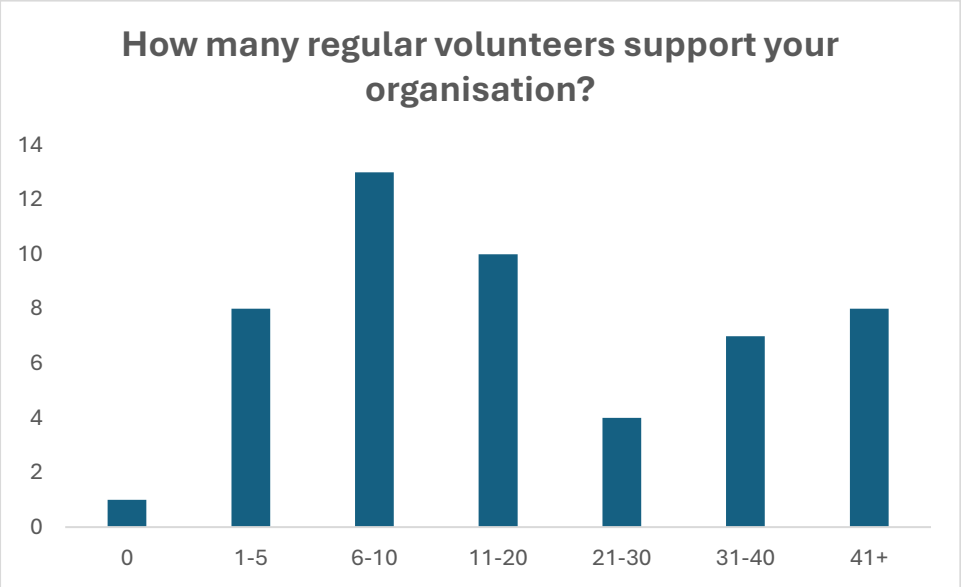
None	23
1-5	15
6-10	4
11-20	3
21-30	0
31-40	0
41+	5
Don’t know	1



When it came to volunteers almost all organisations reported being supported by at least one regular volunteer. 25% of respondents were supported by 6-10 regular volunteers and 20% 11-20 volunteers.

How many regular volunteers support your organisation?

None	1
1-5	8
6-10	13
11-20	10
21-30	4
31-40	7
41+	8



When looking at the number of paid staff and volunteers together three of the five organisations who reported having 41+ full-time equivalent staff reported being supported by 41+ volunteers. Of the organisations who reported having no paid staff 70% of these reported being supported by 20, or fewer regular volunteers.

		Number of paid staff (full time equivalent)						
		None	1-5	6-10	11-20	21-30	31-40	41+
Number of regular volunteers	None	0	0	1	0	0	0	0
	1-5	3	4	0	1	0	0	0
	6-10	7	4	1	0	0	0	1
	11-20	6	2	1	1	0	0	0
	21-30	1	2	0	0	0	0	1
	31-40	5	0	0	1	0	0	0
	41+	1	3	1	0	0	0	3

Recruiting and retaining staff and volunteers

We asked respondents about issues recruiting and retaining staff, volunteers and trustees over the past 12 months. Among the organisations who reported having paid staff and also provided a response to this question (n=26) 50% reported experiencing difficulty recruiting paid staff. When it came to experiencing difficulty recruiting volunteers 63% of organisations responding to the question reported experiencing difficulty and recruiting trustees 47% of organisations responding reported experiencing difficulty.

For retention 42% of respondents who had paid staff indicted difficulty retaining staff, 45% of those responding to the question indicated difficulty retaining volunteers and for trustees the number responding to the question who pointed to difficulty was a much lower 17% Whilst still of concern these figures suggest that recruitment presents a more acute issue to organisations than retention.

Respondents were also asked about trends they had noticed. This received a wide variety of responses with several issues being highlighted. For volunteer recruitment some respondents pointed to the perception that people have less time to volunteer whilst for staff recruitment salaries were pointed to as an issue.

"We have lost many of our older reliable volunteers due to age and other reasons. New volunteers are only staying for a couple of years so a higher turnover due to higher work loads."

"Harder to find people who have free time to give"

"Salary levels in sector falling below equivalent posts in other statutory organisations and in commercial sector"

"1) If people have spare time they tend to use it for second jobs rather than volunteering. 2) service users' needs have become more complex which means you have to ask a lot of the volunteers who support them."

Over the past 12 months have you experienced any difficulties recruiting staff? (Responses from organisations who reported having paid staff)

Yes, a lot	7
Yes, a little	6
No	10
Don't know	1
Not applicable	2

Over the past 12 months have you experienced any difficulties retaining staff? (Responses from organisations who reported having paid staff)

Yes, a lot	1
Yes, a little	10
No	13
Not applicable	2

Over the past 12 months have you experienced any difficulties recruiting volunteers?

Yes, a lot	14
Yes, a little	17
No	17
Don’t know	1
Not applicable	0

Over the past 12 months have you experienced any difficulties retaining volunteers?

Yes, a lot	4
Yes, a little	19
No	25
Don’t know	1
Not applicable	2

Over the past 12 months have you experienced any difficulties recruiting trustees?

Yes, a lot	10
Yes, a little	12
No	16
Don’t know	2
Not applicable	7

Over the past 12 months have you experienced any difficulties retaining trustees?

Yes, a lot	1
Yes, a little	7
No	30
Don’t know	2
Not applicable	7

As a follow-up question respondents who were asked about the impact of any of these difficulties. This was an open question which received 41 responses in total. These were then analysed and assigned a code based on the themes represented within them. Some responses were assigned two codes if more than one theme was present.

The two key themes which emerged were around limiting capacity and strain. In terms of limiting capacity respondents reported that recruitment issues had had the effect of limiting organisational capacity. This could be the ability to deliver both new and existing services, or to develop as an organisation

> "Volunteer help means the service can spread themselves wider, therefore lack of volunteers means the services is limited."

> "Need volunteers to keep projects running, end up with a few volunteers doing a lot of work. Lots of other projects we could set up but just don't have the volunteers to enable us to do this."

Strain, particularly on existing staff, volunteers and trustees was highlighted as an area of impact. In some cases this is linked to capacity issues as existing staff and volunteers are stretched.

> "The same small number of people end up doing everything and get burnt out."

> "Lack of staff to deliver services, leading to existing staff becoming over stretched and stressed."

A few organisations expressed that whilst not resulting in immediate operational issues that they had concerns for the future development and long-term sustainability of organisations. This appeared to be most closely linked to issues around trustee recruitment

If you have answered yes to any of the above, can you describe the impact it has had on your organisation?

Limiting capacity	20
Strain	16
Future concern	5
Other	3

Demand for services

Respondents were asked about demand for services/activities. Of the 51 responses to this question 78% advised that over the last 12 months demand had either increased a little, or a lot. Only 14% reported demand had remained the same, whilst an even lower 6% advised demand had decreased a little.

Over the last 12 months, has demand for your services/activity?

Increased a lot	20
Increased a little	20
Stayed the same	7
Decreased a little	3
Decreased a lot	0
Not applicable	1

Respondents were also asked about trends they had identified in demand for services over the past 12 months. 44 respondents provided an answer to this with a wide variety of themes present. Four of the most common issues raised were increasing complexity, the impact of the cost of living, an increase in demand from families and the impact of the statutory sector.

> "Our services are so varied across the organisation, the common theme is the high level of need for the majority of our services and the increasing complexity of needs of those accessing our support."

> "Gradual increase linked to the cost of living crisis"

"Pretty much the same numbers of people, but more families with children needing the service."

"Public services relying on the voluntary sector to an ever greater extent"

When asked about ability to meet demand over the next 12 months just over half, 55% of respondents, informed that they expected to meet demand over the next 12 months, mostly with 'limited or no spare capacity' though 6% expected to do so with significant spare capacity. Overall the majority of organisations expected to either meet demand with 'limited, or no spare capacity', or to 'almost meet demand', accounting for a combined 75% of respondents. Of those falling short of meeting demand 25% expected to almost meet demand whilst 12% anticipated falling significantly short.

To what extent do you expect to be able to meet demand for your services over the next twelve months?

We expect to meet demand with significant spare capacity	3
We expect to meet demand with limited or no spare capacity	25
We expect to almost meet demand	13
We expect to fall significantly short in our ability to meet demand	6
Don't know	2
Not applicable	2

In terms of changes to meet changing/increasing demands and needs 34 respondents provided an answer to the question, setting out a range of strategies. The most common strategy they pointed to was to increase capacity. In part this was managed through additional funding for which respondents identified a range of sources including grant funds, contracts and reserves.

"Recruiting more staff extending our provision gaining more funding"

> "Applying for funding grants and partnering with community led orgs to bring free activities."

A number of respondents reported that they had not made any particular changes, managing any change within existing resources

> "We have absorbed the extra workload and got on with it!"

> "so far we have just about managed"

Adapting processes was also highlighted. This included changes to working patterns in order to improve efficiency, or in another case contracting elements.

Can you describe any changes you have made to delivery of services/activities to respond to demand or changing/increasing demands and needs?

Increased capacity	13
Additional funding	8
No change	8
Recruitment	5
Adapted processes	5
Limited activity	3
Partnership working	2
Other	2

Income, funding and sustainability

When asked their overall annual income 51 respondents provided an answer. 61% of those responding reported an overall annual income of no greater than £100k. Using the NCVO classification these would be defined as small (£10k-100k) and micro (below £10k) organisations

What is your organisations overall annual income?

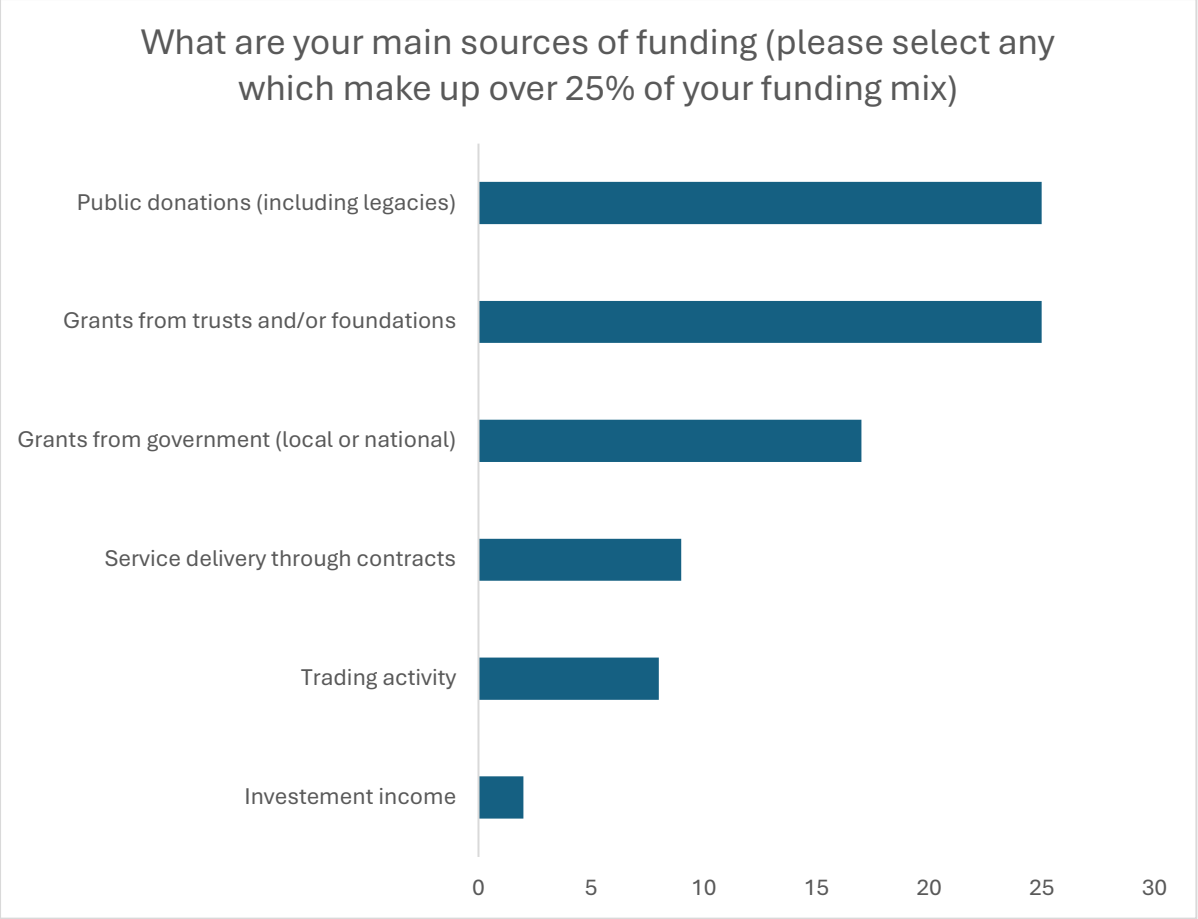
Over £1m	3
£101k - £1m	12

£51k - £100k	5
£10k - £50k	13
Under £10k	13
Don’t know	3
Prefer not to say	2

Looking at funding sources 50 respondents identified sources of funds which made up over 25% of their funding mix. The two sources of funding which were highlighted by most respondents were grants from trusts and/or foundations and public donations (including legacies), both of which made up at least 25% or funding sources for half of those responding to the question. Grants from government (local or national) was identified as a source of funding by just over a third of respondents, some 34%. Further down the list service delivery through contracts made up at least quarter of funding for 18% of respondents and trading activity for 16%.

What are your main sources of funding (please select any which make up over 25% of your funding mix)

Grants from trusts and/or foundations	25
Public donations (including legacies)	25
Grants from government (local or national)	17
Service delivery through contracts	9
Trading activity	8
Investment income	2



Respondents were asked about their overall financial position. Of the 50 who provided an answer a large majority described their current financial position as either 'Good' or 'Fair', accounting for 76% in total. There is however, some cause for concern among 12% of respondents who described their current financial position as 'Poor' or 'Very Poor'

Would you describe your current financial position as?

Very good	5
Good	19
Fair	19
Poor	5
Very poor	1
Don't know	1

Does your organisation hold unrestricted financial reserves?

Yes	29
No	17
Don’t know	5

Is your organisation using unrestricted reserves to meet current operating costs?

Yes	10
No	32
Don’t know	6
Not applicable	2

Overall, respondents appeared optimistic about the likelihood that they will be operating in on years time, with almost three-quarters, 73% suggesting this was ‘Very Likely and one quarter suggesting it was ‘Quite likely’.

How likely is it that your organisation will be operating this time next year?

Very likely	37
Quite likely	13
Quite unlikely	0
Very unlikely	0
Don’t know	1

Challenges

Respondents were asked about a range of challenges which may be facing their organisations and to indicate whether it was a significant, moderate, or no challenge on a scale. In terms of the most significant challenges, recruitment of volunteers was the most common cited by 25% of total survey respondents. This was followed by increasing complexity of need and income which accounted for 24% and 22% respectively. Recruitment of paid staff was cited as a significant challenge by 7 respondents. Whilst this appears to be a relatively modest

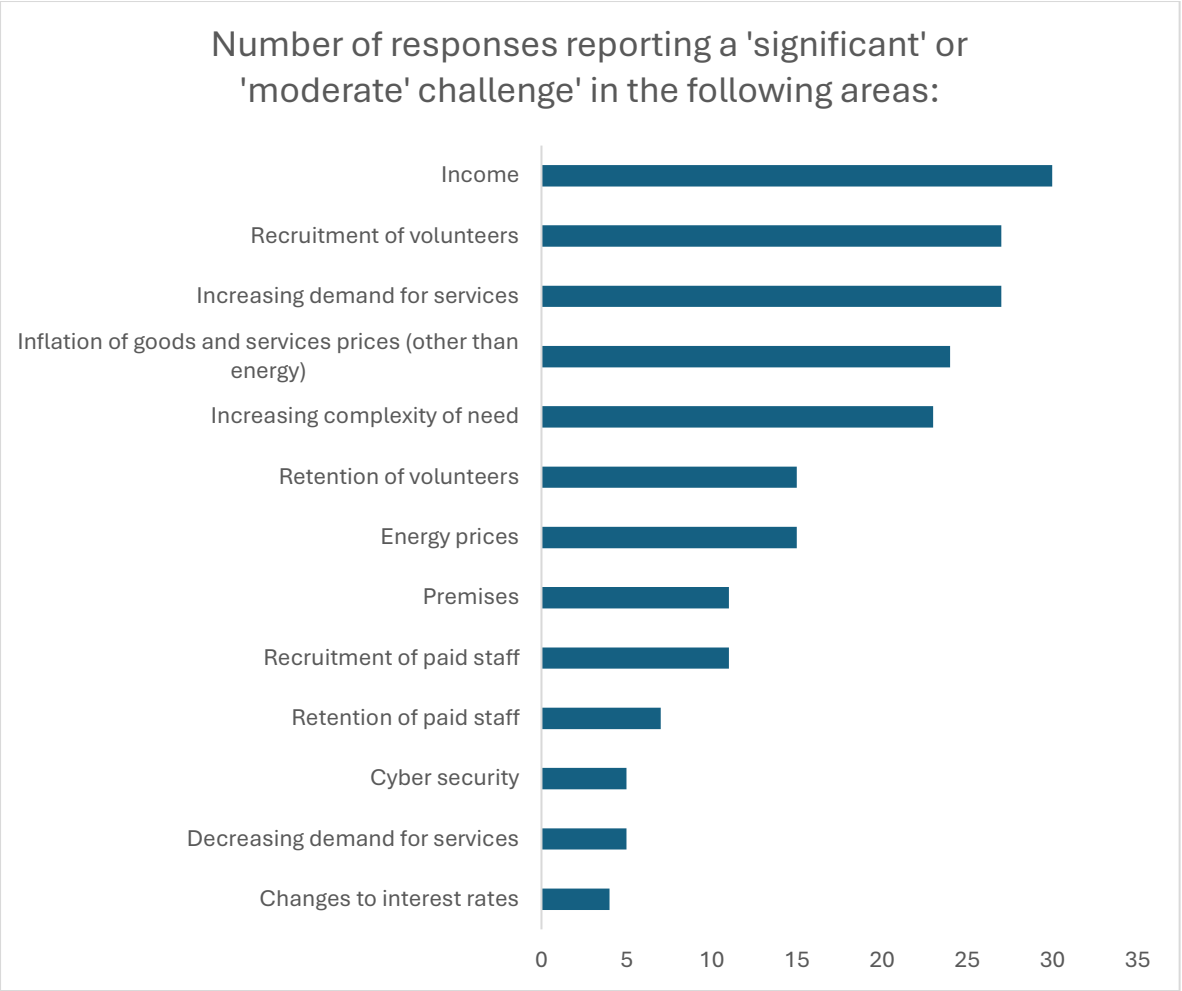
amount it represents 26% of the number of total survey respondents who indicated having paid staff.

For moderate challenges income and increasing demand were both pointed to by 37% of total survey respondents, inflation of goods and services prices by 29% and recruitment of volunteers by 27%.

Which challenges are currently affecting your organisation?

	Significant challenge	Moderate challenge	Minor challenge	No challenge	Don't know	Not applicable
Income	11	19	11	8	0	1
Increasing demand for services	8	19	11	11	0	1
Increasing complexity of need	12	11	14	7	1	5
Recruitment of volunteers	13	14	12	8	0	2
Inflation of goods and services prices (other than energy)	9	15	17	6	1	2
Energy prices	8	7	14	13	0	7
Retention of volunteers	5	10	17	16	0	1
Recruitment of paid staff	7	4	8	12	0	19
Retention of paid staff	1	6	6	16	0	20

Decreasing demand for services	1	4	8	22	1	13
Changes to interest rates	2	2	10	18	3	14
Premises	5	6	6	17	4	8
Cyber security	0	5	12	18	6	8



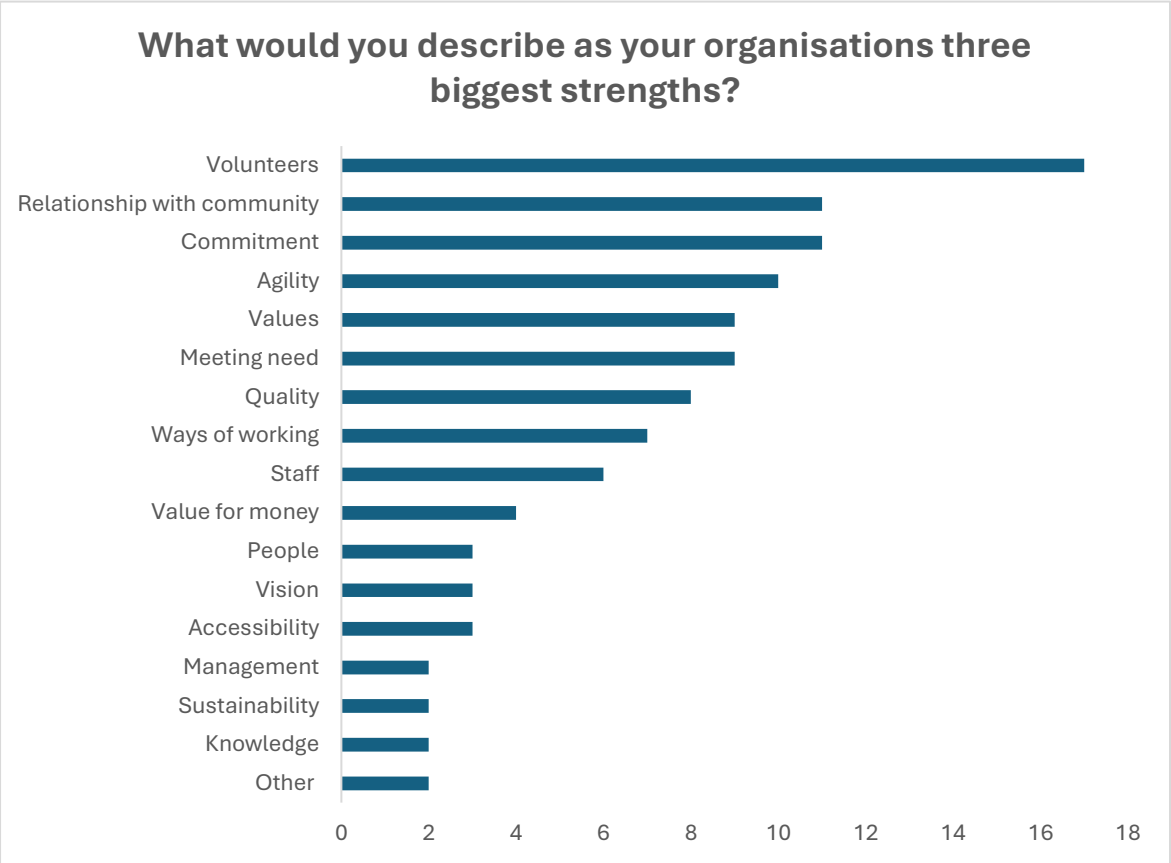
Strengths and achievements

Respondents were asked to list their organisations three biggest strengths. In total 50 responses were received to this question. These responses were then coded based on theme. The most common theme among these was volunteers followed by commitment and relationship with the community.

This response highlighted the centrality of volunteers to the sector within Wiltshire. Many of these themes appeared to be re-enforcing, for example Volunteers were described by respondents as 'willing' and 'dedicated', whilst volunteers serving their community is both a demonstration community support for an organisation and a firm link between the organisation and the community. Similarly commitment and meeting need can be linked to agility as VCSE organisations being mission led are focused on meeting need and are able to flex and adapt to do this in the best way possible.

What would you describe as your organisations three biggest strengths?

Volunteers	17
Commitment	11
Relationship with community	11
Agility	10
Meeting need	9
Values	9
Quality	8
Ways of working	7
Staff	6
Value for money	4
Accessibility	3
Vision	3
People	3
Other	2
Knowledge	2
Sustainability	2
Management	2



Which achievements of your organisation are you most proud of?

In total 50 respondents answered this question. These responses were themed, with codes assigned to themes present in the free text response. An overwhelming majority focused on delivery, in particular the delivery of their core service, speaking of the need they have met, the people they have supported and the projects delivered. The sense of pride in this highlights the centrality of mission to voluntary and community sector organisations.

Sustainability was also a source of pride for some organisations. As one respondent put it simply:

> Keeping it going!

This may well reflect the challenges and effort required to maintain an organisations sustainability, enabling it to continue to deliver its core mission, which requires skill, resilience and adaptability.

Having a good relationship with the community also featured among the themes. This included support from the community and engagement with the community.

Delivery	41
Sustainability	7
Good relationship with the community	7
Volunteers	3
Agility	2
Accessibility	1

Organisational development

Respondents were asked about what kind of support their organisation may benefit from. Identifying sources of funding. Over three quarters of organisations, some 78%of total survey respondents, advised their organisation would benefit from support with this. A similarly high proportion indicated they would benefit from support with writing funding applications. Networking with other organisations and marketing and communications were areas in which a large number of respondents felt they would benefit a little from support with, suggesting that although these may not have been the same critical priority as funding they were nevertheless areas in which organisations would benefit from support.

Would your organisation benefit from support in any of these areas?

	Yes, a lot	Yes, a little	No	Don't know	Not applicable
Identifying sources of funding	18	22	6	3	2
Writing funding applications	11	14	19	2	4
Developing a business plan	5	11	27	3	4

Monitoring and evaluation	7	15	22	2	4
Networking with other organisations	5	30	12	1	2
Marketing and communications	8	28	12	2	0
Organisational strategy	5	10	28	3	3
Equality Diversity and Inclusion	3	16	28	0	3
Climate change policy	2	12	31	1	4
IT/ Digital	8	24	16	1	2

When asked about barriers to training and development the main barrier identified by respondents was available time, followed by available budget.

Do any of the following present barriers to accessing training and development?

Identifying suitable training/support	13
Available budget	23
Available time	32

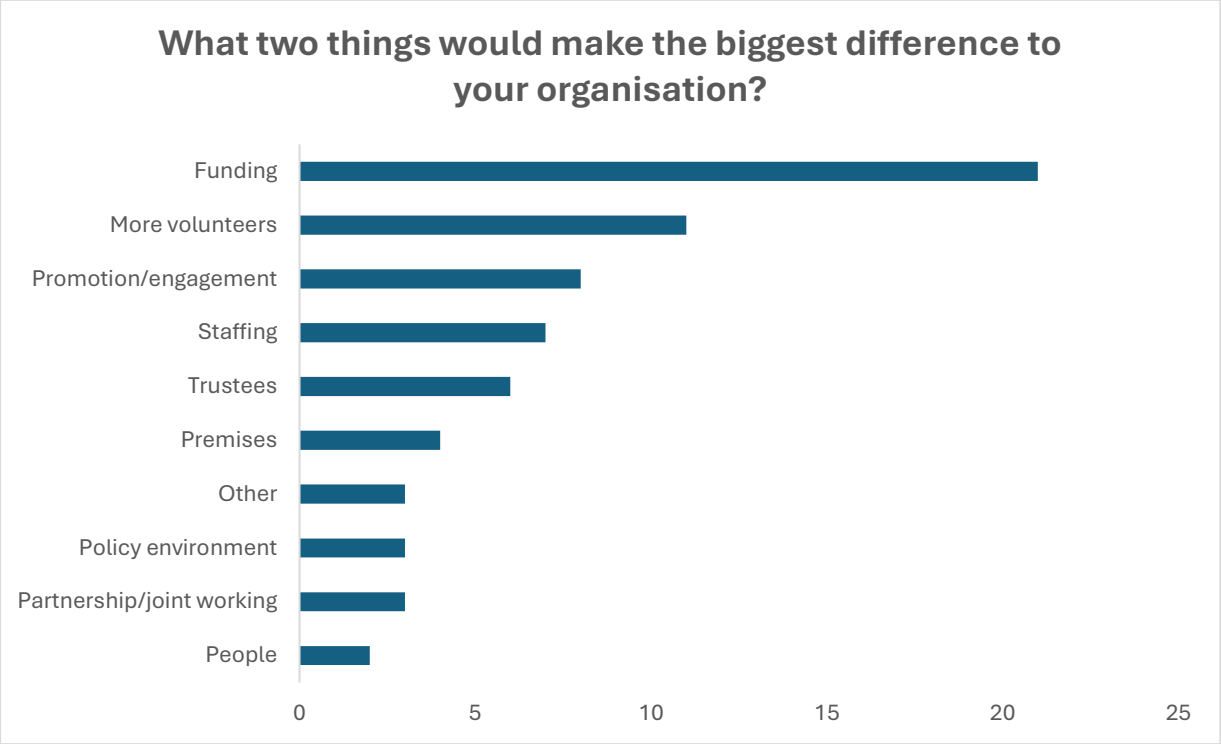
What two things would make the biggest difference to your organisation?

Respondents were asked to list two things they felt would make the biggest difference to their organisation using a free text box. In total 46 responses were received to this question. These were coded based on theme.

The most common theme was funding which accounted for 21 responses, Some 46% of those responding to the question. Amongst these responses were some who mentioned a desire to secure more long-term funding rather than shorter term funding. More volunteers was the second most common theme, raised by 11 respondents, just under a quarter. This is consistent with other findings in the survey about the importance of volunteers to the groups who responded to the survey.

Promotion and engagement was another theme referred to by several groups. This included raising the profile of an organisation and the services it offers through social media and marketing. Alongside volunteers staffing, trustees, or 'people' referred to the human element of organisations and the crucial capacity and skills they bring. When mentioning trustees several respondents highlighted their view that a wider trustee skill set would make the biggest difference to their organisation.

Funding	21
More volunteers	11
Promotion/engagement	8
Staffing	7
Trustees	6
Premises	4
Partnership/joint working	3
Policy environment	3
Other	3
People	2



Thank you!

Thank you to all of those who took the time to participate, promote, or engage with the survey. If you would like to discuss anything further, including plans for the 2025 state of the sector survey, please get in touch with Wessex Community Action at partnerships@wessexcommunityaction.org.uk