



# State of the sector 2020

**Where we stood as the crisis hit**

**Our research on the big questions facing charities**

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# Executive Summary

Three years ago, NPC surveyed charity leaders on their perceptions of the issues of the day, the challenges they faced and their plans for the future. Recently, we ran a very similar survey, concluding at the beginning of 2020, with some new questions to reflect a new context. We wanted to see what progress the sector had made and what its new challenges and opportunities were.

But nothing could have prepared us for the seismic shifts experienced in 2020. Five months in, and the context in which charities operate has transformed more than we could ever have imagined. Coronavirus is the dominant crisis faced by all charities and the nation. It has changed almost everything, we are seeing unprecedent challenges to many charities' business models, [systems change is happening in real time](#), there is an accelerated shift to digital and, most importantly, heightened risk to many of the people that charities support, as well as those they will now have to support. How we move forward will very much depend on our [appetite for bold change](#).

This research, with our field work concluding in January 2020, does not cover the impact of the coronavirus crisis on charities. Rather, it paints a picture of our sector in the final few months of relative calm before the storm, offering insight into its strengths, weaknesses, challenges and risks. In doing so, we hope that funders, philanthropists and policymakers will be better able to identify where charities are vulnerable to the impacts of coronavirus and vulnerable to the potential economic hardship we are heading into. Looking to the future, we hope this research will help charities to discern the strengths we want to hold on to, and the weaknesses we should cast aside as we rebuild.

As the crisis hit, we released [State of the Sector 2020: The condition of charities before the COVID-19 crisis](#), which detailed our research findings that were most useful for the sector's short-term response. This paper, [State of the Sector 2020: Where we stood as the crisis hit](#) delves deeper into those issues, and others which are less immediate but are nonetheless important to understanding how the sector saw itself before the crisis. We believe they remain relevant to the sector's resilience, and its ability to support our country's recovery over the coming months and years.

We have divided the report into three sections:

1. **People, politics and procurement:** The sector's commercial relationship with the state, public trust, and lobbying and campaigning.
2. **Data, digital and use of evidence:** Data and digital skills in the sector, and how they are used to improve work done by charities.
3. **Charities in a changing world:** Thinking about how charities operate, who they serve and who works for them.

Our headline findings for each section are as follows:

## 1. People, politics and procurement

- More than half of the charities we spoke to held a public sector contract. 57% of these are subsidising their public sector contract(s) with income from other areas such as public fundraising.

- We found that since 2017, there has been a big increase in small and medium sized charities saying that they hold a public sector contract, possibly enabled by inclusion in consortia.
- There is widespread agreement that public trust in the sector has fallen. Only 5% of charity leaders we spoke to believed that public trust had not dipped in the last few years. Despite this, most felt that falling public trust would not affect their operations. Where they did, they were most concerned about fundraising (by a large margin).
- While a majority of charity leaders felt that the sector was already 'political enough', in our survey there were still more respondents who felt it should be more political than less political.
- Two thirds of charities reported changing their operations as a result of austerity. Conversely, most had made no attempts to prepare for Brexit.

**Figure 1: In the last three years have you made any major or minor changes to your strategy or operations as a result of austerity or cuts?**



Base: All charities (n=300); All small / medium charities (n=120); All large charities (n=121); All major charities (n=59)

## 2. Data, digital and use of evidence

- 95% of our respondents agreed that the use of data and evidence were important to them achieving their mission.
- But, comparing our survey of perceptions with independent benchmarks like the Lloyds UK Charity Digital Index (Lloyds Bank 2019), suggests that charities are overconfident when it comes to their ability to use data to evaluate their work.
- Conversely, charities' perceptions of their digital abilities have become more negative since 2017 and more negative than the aforementioned digital index would suggest they should be. Familiarity does not breed confidence when it comes to charities and digital. It may be that the more you know, the more you realise how much there is that you don't know.

### 3. Charities in a changing world

- We found that charities were doing more of everything we asked about in 2017 and planned to do even more in the future. This came despite overall funding for the sector remaining relatively static, which suggests that charities were already stretching their resources before the crisis.
- Charities are remarkably positive about their funders in this survey but, of the organisations who receive money from independent funders, only 47% thought that they offered appropriate core funding and only 45% thought that their funders collaborated well. A lack of flexible core funding could affect charities' resilience, and a crisis on this scale demands more collaboration between funders.
- Fewer charities reported having conversations at board level about strategic issues and how they should respond to them. In particular, we found a significant decline in charities talking at board level about merging with another organisation (25% in 2020 vs 34% in 2017).
- When asked about it, charities are very positive about user involvement but, when asked to rate the factors that they feel are most important to their impact, few mention it.
- Four out of five charities (78%) say that they think their current staff are not fully representative of the population they serve. When asked from which groups they think they needed to recruit more people from in order to be representative of their users, the most common answer given by charities was people of different ethnicities (41%).

These findings conclude the first phase of *State of the Sector 2020*. To respond to the radically different world we now find ourselves in, for the second half of 2020 we will re-orient this programme to research the key challenges the charity sector is likely to be facing over the medium-term due to the Covid-19 pandemic. We will produce solutions, and advocate for change and support for the sector. [Please get in touch with us to find out more.](#)



# Methodology

## Sampling

Our sample frame for the survey was drawn from an extract of the Charity Commission database drawn in September 2019 (Charity Commission of England and Wales n.d.). This is derived from the requirement on all charities in England and Wales to register and supply specific financial and nonfinancial information to the Charity Commission each year.

All organisations except 'general charities' were **excluded** (hence we excluded independent schools, colleges and universities, academies, NHS administered charities and independent hospitals, religious bodies and places of worship, mutual organisations, masonic lodges, trade associations, professional bodies, central or local government administered and regulated bodies, housing associations, benevolent institutions and inactive organisations).

Within general charities we also excluded business and professional organisations, grant making foundations, labour unions, parent teacher associations, scout groups, student unions, village halls and playgroups / nurseries.

We excluded all organisations with an unstated income, or income below £10,000. Our view was that community organisations are significantly different to larger organisations and would require a separate research approach.

The remaining organisations were divided into three strata according to their most recently reported income:

- Major charities with an annual income over £10,000,000 (599 charities within the sample frame).
- Large charities with an annual income between £1,000,000 and £9,999,999 (3,981 charities within the sample frame).
- Medium / small charities with an annual income between £10,000 and £999,999 (51,098 charities within the same frame).

Charities were then sampled randomly on an initial ratio of 10:1, so we could target c.100 interviews in each strata. In practice, this meant that every major charity was in our sample.

The medium / small charity strata was further divided into ten sub-strata by annual income. Equal numbers of charities were selected from each sub-strata to avoid any bias towards the smaller end of the overall strata.

No other quotas apart from the size of the charity were used.

## Respondent eligibility

All respondents were chairs / trustees or 'external facing' directors at charities registered in England & Wales. To be eligible, respondents needed to have been involved with the charity for at least three months.

## Fieldwork

Fieldwork for the quantitative research was conducted by [ComRes](#) by telephone between 12 November 2019 and 22 January 2020 (before the outbreak of Covid-19 in Europe).

300 interviews were conducted and the questionnaire took around 15 minutes to complete.

## Sample profile

The following table describes the achieved sample by key variables.

| Variable   | Achieved sample |
|--|-----------------|
| <b>Organisation size</b>                           |                 |
| Major: £10m+                                       | 59              |
| Large: £1m - £10m                                  | 121             |
| Small / Medium: £10k - £1m                         | 120             |
| <b>Respondent role</b>                             |                 |
| Chair of Trustees / Trustee                        | 24              |
| Chief Executive / Managing Director                | 254             |
| Other  | 22              |
| <b>Type of activities</b>                          |                 |
| Culture and recreation                             | 44              |
| Development  | 10              |
| Education  | 9               |
| Environment  | 15              |
| Health   | 41              |
| Research   | 13              |
| Umbrella bodies                                    | 6               |
| International                                      | 16              |
| Employment and training                            | 8               |
| Law and advocacy                                   | 24              |
| Housing  | 13              |
| Religion   | 14              |
| Social services                                    | 86              |
| Other  | 1               |
| <b>Where charity operates (multicode question)</b> |                 |
| Locally  | 223             |
| Nationally   | 129             |
| Internationally                                    | 66              |
| <b>Region</b>                                      |                 |
| East Midlands                                      | 19              |
| East of England                                    | 16              |
| London   | 106             |
| North East   | 7               |
| North West   | 35              |
| South East   | 41              |
| South West   | 23              |

|                      |    |
|----------------------|----|
| Wales                | 10 |
| West Midlands        | 22 |
| Yorkshire and Humber | 21 |

## Data and reporting findings

Data are unweighted. The report makes some comparisons to an earlier State of the Sector NPC / ComRes survey conducted in 2017. This survey was conducted using precisely the same methodology described here.

As far as we are aware, this is the largest and most robust survey of charity leaders to date, but in statistical terms the sample size is still small and therefore a lot of the differences we find in the data are not statistically significant. Therefore, we have opted to report on differences and patterns within the data that are large enough to be interesting but not large enough to meet the threshold of statistical significance, but we have indicated this in the text for transparency.

We have also grouped certain regions together to get groupings large enough to do a geographic analysis. These groupings are as follows:

### North of England



**Charity breakdown by region**

North of England: North East 7, North West 34, Yorkshire and Humber 21.

### Middle of England and Wales



Middle of England and Wales: East Midlands 19, East of England 16, Wales 10, West Midlands, 22.

### London



London: London 106.

### South of England



South of England: South East 41, South West 23.

# 1. People, politics and procurement

## In this section we explore:

- How policy affects charities, and how charities want to influence policy.
- The scale of, and the issues with, charities' involvement in government contracts.
- Charities' views on the importance of public trust.

## How policy affects charities, and how charities want to influence policy

Many of the issues that charities work on are inherently political. Problems around poverty, health or homelessness can be partly caused by failures or side effects of government policy, and the solution will often have a role for national and local government to play. Some charities are famous for their campaigns to engage the public, and by extension policymakers, who then change the law. Even charities solely focused on service delivery have to understand the potential impact of changes in policy on their demand or delivery model.

Charities are forbidden from being political entities by the Charity Commission which states 'An organisation will not be charitable if its purposes are political'<sup>i</sup> (The Charity Commission n.d.). However, they are permitted to campaign on political issues, and to try to change the law, so long as this is not their sole objective and they do not favour any political party. This is a fine line to walk, and often controversial, so we wanted to understand how charities see the role of political influencing as part of their arsenal.

This is a complicated question which is particularly relevant now, as government, independent funders and philanthropists try and work together to tackle the Covid-19 crisis.

## Most charities report trying to influence policy, with more small and medium charities getting involved

Within a charity's day to day operations there are a range of potential activities which are influenced by the political context. Here we will discuss charities' responses in relation to their overt work with government on influencing policy. We have separated out government contracts and commissioning for specific consideration on page 12.

Influencing can take many forms:

- 64% of charities said they worked with government to influence policy to some extent, a slight increase from 59% in 2017.
- Policy work was most common among major charities (83%), followed by large (68%) then small and medium (52%).

- There was a striking growth in policy work among small and medium charities, up 21 percentage points from 31% in 2017 to 52% in 2020. This is a significant increase but we do need to be cautious because of small sample sizes at sub-group level.
- The proportion of large and major charities undertaking policy work was slightly down (from 70% to 68% for large and 87% to 83% for major), though they are still the groups that do the most of this type of work.

The fact that so many small and medium charities, who are not generally thought of as being well equipped to do this kind of work, are undertaking it, challenges perceptions about what this part of the sector does. Similarly, whilst those familiar with larger charities will be unsurprised that 83% of major charities and 68% of large charities are working to influence policy, the prevalence of this activity in different parts of the charity sector is not always obvious to those not familiar with the sector.

Policy influencing was reported as an activity by most national charities (74%) and international charities (68%), and was the least reported by local charities (61%). Charities who deliver government contracts were more likely to also do policy influencing work.

It is interesting that such a high proportion of charities think that influencing policy is a route to impact. The survey indicates, for example, that charities are running more campaigns (from 65% up to 74%). Moreover, this increase in campaigning was primarily driven by small and medium charities. Less than half (46%) said they did this ‘at least sometimes’ in 2017, whereas 70% said the same in 2020. It’s not known if these campaigns are political or seen by charities as part of an influencing strategy.

## Charities expected to do more in future to influence policy, especially bigger ones

Generally, the survey suggests that the sector expects to increase their involvement in influencing government policy.

- A third of charities said they expected to be doing more work with government to influence policy over the next three years, with almost everyone else (64%) saying they expected to be doing about the same. Only 2% anticipated doing less. It should be noted that charities said they expected to do more of every category of activity that was offered to them in the survey.
- Size matters, with major charities most likely to expect to do more policy work (41%). Next were large charities (33%), followed by small and medium (29%).
- National and international charities, who already do the most policy engagement, were also the most likely to report planning to do more (43% and 44% respectively), compared to just 30% of local charities.
- There were striking differences between regions when asked about plans to engage with policymakers over the next three years. Only 21% of our respondents in the North planned to increase their policy activity, whereas 59% of respondents in the South said they planned to engage more to influence policy in the next three years.

The geographic divide when it comes to future plans is notable because the North and the South were the two regions which reported the lowest amount of current policy influencing activity. Each would have to do more to reach the national average, but far more charities in the South expect to do much more compared to charities in the North.

It is hard to account for the large difference in expectations between the North and the South just by using this survey. We note that the 2019 general election took place early in the period when our field work was being carried out, which may have led to uncertainty for some respondents.

## Austerity affected two thirds of charities with the biggest charities changing the most

The majority of charities, 69%, report having changed their strategy or operations in the last three years as a result of austerity or cuts. This could have been caused by cuts in government funding, increased demand for charitable help, or a combination of the two.

A change in strategy or operations as a result of austerity was most common among major charities, where 80% reported they had done so, 71% of large charities reported the same, followed by small and medium charities at 61%. This may be because larger charities are more likely to have government contracts.

85% of charities which held a government contract reported making a change as a result of austerity. This is significant because the majority of charities we surveyed held public sector contracts and they expect to be doing the same amount of contracts in future, or even doing more. Contracts are explored in more detail from page 12.

These findings may seem contradictory, but they reflect the increasingly complicated nature of the relationships between charities and government. Charities find themselves, either by choice or need, delivering services once provided by the public sector.

## Charities we spoke to hadn't acted on Brexit

We asked an open-ended question about the steps charities had taken, if any, in response to Brexit. It is worth reiterating that the field work for this research took place between December 2019 and January 2020, a period which included a general election and greater uncertainty around the Brexit process.

We received a wide range of responses, but the most common answer (58%) was that charities had made no changes or preparations.

Where they had acted, respondents often referred to supporting their own staff to understand their employment rights and thinking about or acting for their service users.

Many of those who had taken no action did not explain why. Among those who did, a common explanation was the perception that Brexit will not affect them because they do not operate internationally. This perhaps misunderstands the fundamental economic and societal shifts that we are likely to see as a result of Brexit. Particularly in areas such as workers' rights and products standards, which could affect everyone.

For now, Brexit may have been eclipsed in the media by coronavirus, but negotiations on our future relationship with Europe are still ongoing and so Brexit remains relevant for the future. If charities had not prepared when we conducted this survey, they will find it even harder now.

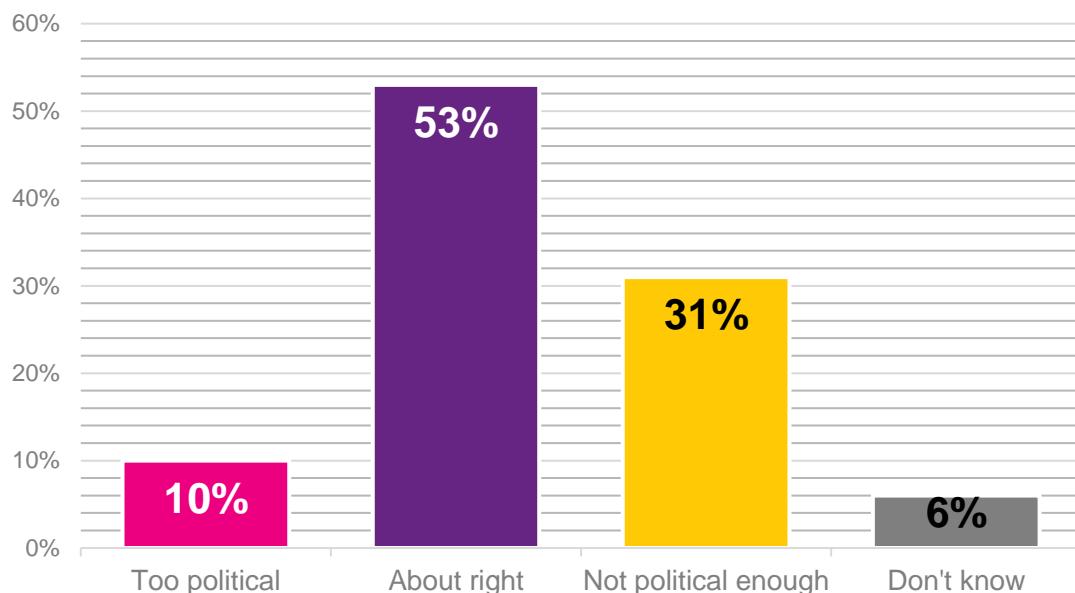
The responses we received suggest that charities will need clear advice and explanations of how Brexit will affect them before they are willing to prepare for it. At the time of writing this, the 2020 Brexit transition period is set to end in just over six months' time. Any Brexit guidance will need to reach charities soon if they are to take it on board and have time to plan, especially in light of the strain placed on them by the Covid-19 crisis.

## The majority of charities think the sector is political enough, but there is division

When asked about the charity sector as a whole:

- A third of respondents said it was not political enough.
- 53% thought overall that the sector gets the balance right on being political.
- 10% thought it was too political.

**Figure 2: Percentage of respondents when asked if the sector was too political or not political enough**



*Base: All charities (n=300); All small / medium charities (n=120); All large charities (n=121); All major charities (n=59)*

With the proportion of charities who think the sector is too political so low, it is hard to do meaningful analysis with that group. However, we can say that it is a much more common view among small and medium and large charities than major charities and slightly less common among international charities than national or local charities.

There was not significant variation by charity size, but major charities were the most likely to say the sector is not political enough, with 34% saying this compared to 31% of large charities and 29% of small and medium charities.

With the sector looking for more support from government to get through the coronavirus crisis, it will be interesting to see if charities still think they are getting their level of political involvement right at the end of this year.

## The scale of, and the issues with, charities' involvement in government contracts

The most recent NCVO almanac (which covers the years 2016/17) suggests that 31% of the charity sector's income comes from government, a figure of around £15.8bn. In recent years, an increasing proportion of this has come from contracts rather than grants.

In our 2017 State of the Sector report, 64% of respondents reported cross subsidising their government contracts with other income, a level we were concerned was unsustainable. We did not know that the Covid-19 crisis was coming when we carried out this survey, but NCVO's forecast that charities could lose £4.3bn in fundraising income between March and June 2020 (Whitehead 2020) means that there are now even more questions to be asked about whether this level of subsidisation can continue.

## **Over half of charities deliver a government contract, and smaller charities seem to be increasing their involvement**

Of the charities we surveyed:

- Just over half (54%) delivered public sector contracts as part of achieving their mission, a rise of 6 percentage points since 2017.
- 65% of respondents said they expect to be delivering public sector contracts at 'about the same' level in three years' time.
- A quarter (25%) said they expect to be doing more.
- Only 7% said they expect to be doing less.

These proportions are very similar to what charities said in 2017, where 64% said they expected to do 'about the same', 23% said they expected to do more and 11% said less.

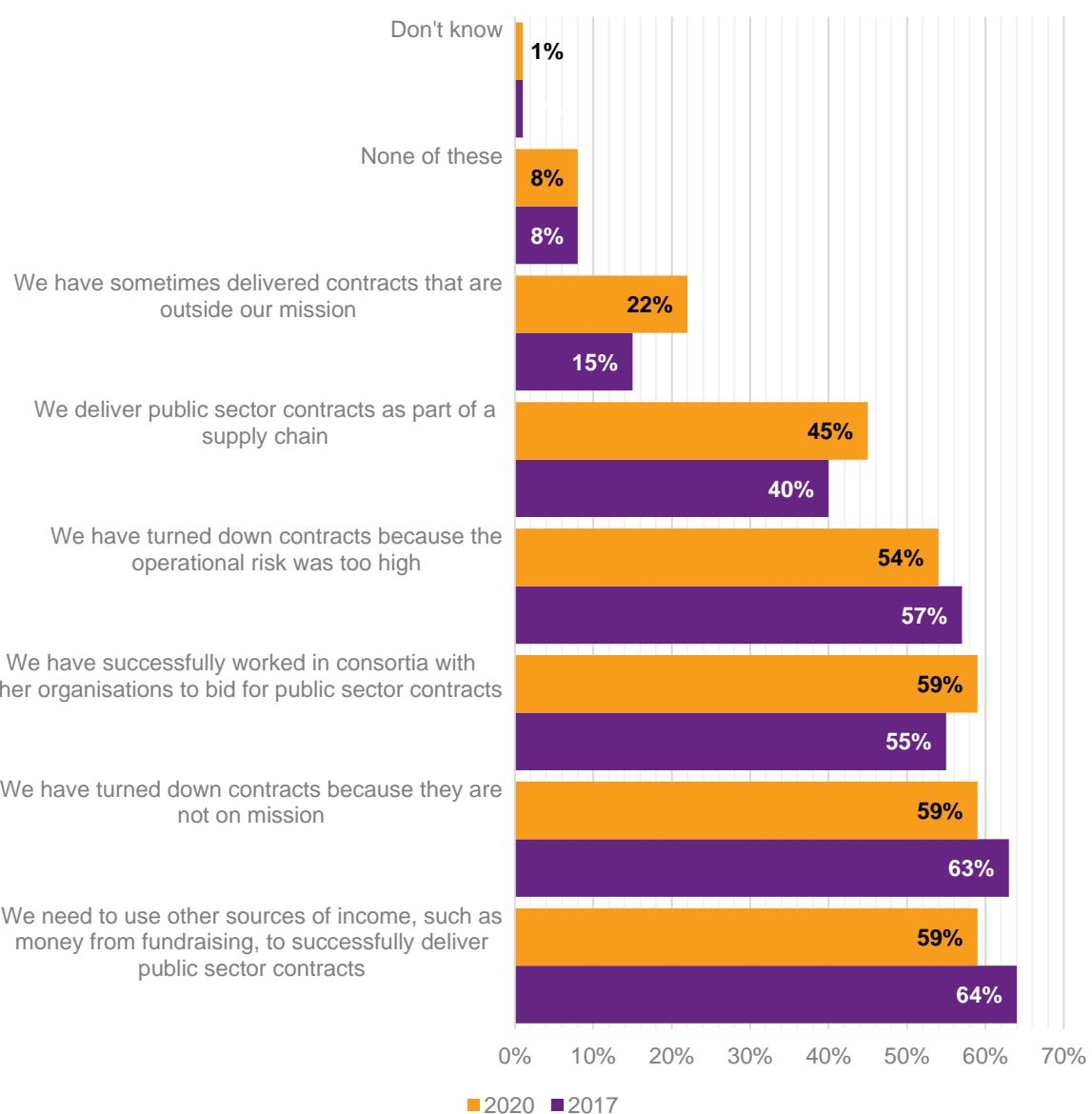
73% of major charities said they deliver public sector contracts at least sometimes, almost double that of small and medium charities (38%), and higher also than for large charities (60%).

But while the bigger charities still dominate, there was a 100% increase in the number of small and medium charities reporting that they deliver public sector contracts in 2017. This is a dramatic result, and should be approached with a degree of caution. It is one we would like to investigate further.

Meanwhile, there was a slight decrease in the number of large charities reporting that they took on public sector contracts as part of their mission (down 5%) and an increase in the number of majors charities doing so (up 9%).

We saw a modest increase in the overall proportion of charities saying that they have worked in a consortia to bid for a contract, up four percentage points from 2017 to 59% of charities with a contract. Within this, there was a very large increase in the proportion of small and medium charities doing so. One in four (26%) small or medium charities which held contracts reported being involved in consortia in 2017, yet now 59% of those with a contract do (although small sample sizes mean we need to be cautious about this finding). Smaller charities may view consortia as a means to compete with larger charities and private sector providers, by accessing elements of government contracts at a scale that would usually make them ineligible.

Figure 3: Delivering public sector contracts 2019 vs 2017 (% who deliver public sector contracts)



Base: All who deliver public sector contracts in 2017 (n=143), in 2019 (n=162)

We are interested in the make-up of these consortia. The proportion of charities which reported being involved in successful consortia is quite consistent across all charity sizes (58% - 60%). If consortia were mostly about smaller organisations banding together to emulate the scale of a larger one, we would expect to see a higher proportion of small and medium charities being involved in consortia compared to others, and we don't. We can therefore speculate that most consortia contain a mixture of charities of different sizes.

NPC has encouraged collaboration in the sector, so we need to know more about these consortia. There are concerns that smaller charities are used by larger charities or private businesses to enhance their bids, but are shut out once the contract is won. For example, concerns of this nature were raised in the Centre for Social Justice's *Commissioning Excellence in Disability: An assessment of the Department for Work and Pensions' nationally contracted disability employment provision* (The Centre for Social Justice 2020) and *Rebalancing the relationship: emerging findings and draft recommendations* (NCVO 2020) from NCVO and ACEVO.

## Geography matters in government contracts

As Figure 4 shows below, respondents were more likely to say they delivered a public sector contract the further north in England and Wales they were located.

Figure 4: Proportion of charities reporting delivering public sector contracts by geography

### North of England

**59%**



Middle of England and Wales

**58%**



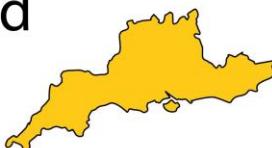
London

**51%**



South of England

**48%**



*Base: All charities (n=300): North of England: North East 7, North West 34, Yorkshire and Humber 21. Middle of England and Wales: East Midlands 19, East of England 16, Wales 10, West Midlands, 22. London: London 106. South of England: South East 41, South West 23.*

This may be linked to the kind of need in different areas, different levels of available charities to commission from, or the procurement practices of different local authorities. This is an area for further investigation.

- Charities we spoke to were more likely to say they received a local government contract in the last three years (54%) than a national government one (29%).
- Local charities were more likely than national or international charities to have received funds from a local government contract in the last three years (62% vs 47% and 29% respectively).

This may suggest that local government offers smaller contracts of less interest to national charities, or that it has an ethos of 'buy local'. Again, this is an area for more investigation in future.

Conversely, national charities were more likely than local ones to have received funds from central government contracts (37% vs 26%). It may be that central government issues more large contracts, which cover multiple regions, and national charities are more likely to have the scale needed to be involved in these.

## Charities feel the social value act has not been influential

54% of the charity leaders we surveyed said the 2013 Social Value Act, which ‘requires people who commission public services to think about how they can also secure wider social, economic and environmental benefits’ (Cabinet Office n.d.), had little or no influence on the way local government commissions services and 58% said the same about central government. Only 21% said it had ‘at least a fair amount’ of influence on local government, and only 11% said it had ‘at least a fair amount’ of influence on national government.

Perhaps surprisingly, charities who delivered a public contract were slightly (though not statistically significant) more likely to say the act had no effect. 64% of charities with a public sector contract said this about national government commissioning, compared to 52% of those without a contract. For local government commissioning, the picture was similar, splitting 59% to 49% respectively.

This would seem to suggest the more familiarity an organisation has with commissioned public services, the less influential they feel the act has been.

## Subsidising contracts

One of our headline findings in 2017 was that 64% of charities we surveyed said that they needed to draw upon other sources of income, such as fundraising, to successfully deliver public sector contracts. This is often framed negatively, as cross subsidising, though it is possible that charities consider it as just another way they can use their income to help deliver their mission.

We found this practice is still very high or common place in 2020, at 59%, which is a decrease, but not one that is statistically significant. The picture varies across different charity sizes:

- Major charities are the least likely to cross subsidise, with 44% reporting they had done so. This is not a significant change from 2017, when it was 41%.
- 61% of small and medium charities said they had cross subsided.
- The most likely to cross subsidise were large charities, at 66%, which is also not a significant change from 72% which we found in 2017.

We do not know if cross subsidising is seen as a problem or is simply a feature of delivering a public sector contract. But it is striking to see so many small and medium charities doing this, when we can fairly assume they have the least resources to fill the gaps left by a contract that does not offer full cost recovery. The financial strain imposed on some charities by the current crisis makes this extra worrying.

The fact that the overall level remains similar to 2017 may suggest that it is simply ‘priced in’ by charities when they are bidding for contracts. But can smaller charities, with less experience and less ability to access experts, reliably make this pricing calculation?

## Risk

54% of charities reported turning down a contract because the risk was too high, which seems to be up from the 47% we found in 2017. Once again, perhaps because of their increased role and growing exposure to public sector contracting, the biggest increase here was among small charities—where the number saying that they had turned down a contract because of risk increased 138% in 2020 vs 2017. However, despite this increase, small and medium charities were still the least likely to have turned down a contract due to risk, with 41% saying that

they had. Large charities were next at 55% and major charities were the most likely to have turned down a contract with 65% reporting having done so.

These proportions may reflect the degree of discernment in the different sizes of charity, the different levels of risk in the contracts they are offered, a mixture of both, or some other factor. Exploring them further could be important as we try to understand how charities think about risk in the coronavirus crisis.

One in five (22%) charities that deliver public sector contracts say they have sometimes delivered contracts that are outside of their core mission, an increase of seven percentage points since 2017, although the difference is not significant. We need to know much more about this group, what they understand to be off-mission and why they have taken on these contracts. Perhaps most importantly, we need to understand if this is something charities do habitually or as a bridge to help shore up their finances. If this is habitual, it raises issues about the impact on the culture and governance of the charities where this is happening.

## **Charities' views on the importance of public trust**

Charities regularly poll among the most trusted institutions in Britain, higher than 'The Church', government (Harrison-Byrne 2019), councils, or banks (The Charity Commission for England and Wales, Populus 2018).

Trust is considered by the sector to be vital to its fundraising, volunteering and campaigning efforts, as it gives it legitimacy. But there is some evidence that pre-covid levels of public trust in the sector were fluctuating and may have been declining (Charities Aid Foundation (CAF) 2019) (The Charity Commission for England and Wales, Populus 2018).

As the coronavirus crisis develops from a health challenge to an economic onslaught, charities can rise to the occasion and justify the trust the public places in them. However, without change in delivery and communications, the potential for the sector to stumble is very real.

## **Charities believe public trust is declining**

Of the charities we surveyed, just 5% said that they did not think public trust was declining (down from 10% in 2017).

Charities' near unanimous pessimism that they are losing the public's trust is interesting, as the wider evidence gives a more varied picture:

- The Edelman 2020 Trust Barometer states that 'Trust in NGOs' is up one point this year on 2019. (Edelman n.d.).
- In 2018, the Charity Commission said that trust had 'plateaued since 2016,' though their mean trust and confidence measure shows it slightly down in 2018 at 5.5, from 5.7 in 2016. (The Charity Commission for England and Wales, Populus 2018).
- Work by ACEVO and NFP Synergy suggests that trust is volatile, with peaks and troughs within a year, and it was increasing at the beginning of 2019. (Harrison-Byrne 2019).

## A significant portion of charities believe falling trust in the sector will not affect them

Despite perceiving trust to be falling, almost half (45%) of the charities we surveyed said declining public trust in the sector in recent years will have no effect on them, compared to 31% saying the same in 2017.

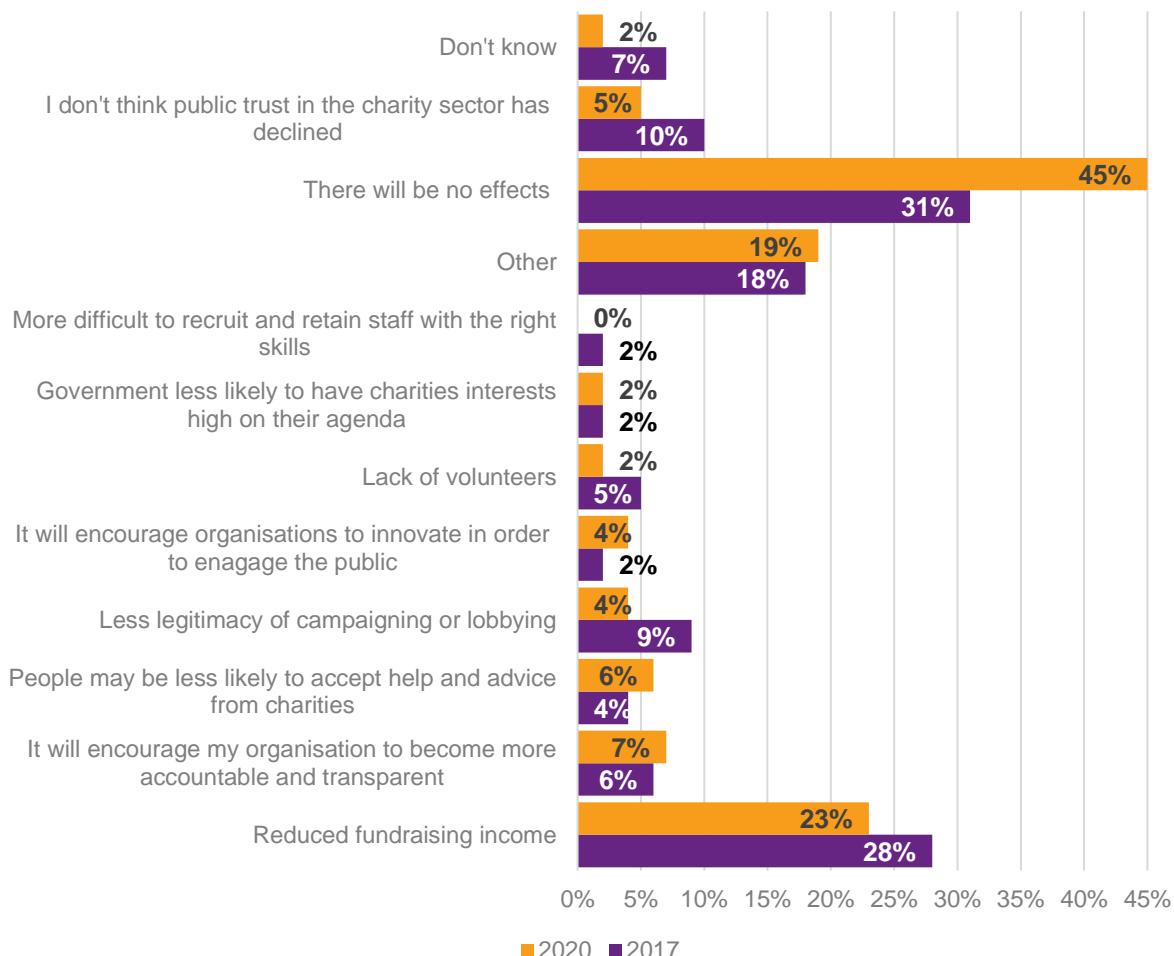
- The belief that a decline in trust would not affect a respondent's charity increased the most in major charities (from 17% to 39%) and large charities (from 26% to 44%).
- Small and medium charities, who were already confident, largely remained confident. 50% said falling trust would not affect them in 2020, compared to 45% in 2017.

The difference in concern about trust between smaller / local and larger / national / international charities may be because charity scandals over the last few years have tended to feature major charities.

## The consequences of losing trust

We asked charity leaders a range of questions about the specific impacts a lack of trust may have (see Figure 5). Where charities thought there would be an effect, they overwhelmingly thought it would be seen in reduced fundraising income, although this is down slightly since 2017.

Figure 5: Effects of a decline in public trust towards the charity sector—2020 vs 2017



Base: All respondents 2017 (n=300); 2019 (n=300)

However, even in this area, the overall number of charities which think that reduced trust could lead to reduced fundraising income seems to have dropped by five percentage points (from 28% to 23%), although this difference is not significant. This has mostly been led by the major charities, where the proportion that are worried about trust and income has halved since 2017 (from 50% to 25%).

The optimism among major charities perhaps suggests that, since 2017, they did not see a drop in fundraised income that they could link to trust. This is interesting because NCVO Almanac data, which is only available up to 2016 / 2017, suggests funds from the public were slightly down having been on an upward trajectory since 2008 (NCVO n.d.).



## 2. Digital, data and use of evidence

### In this section we explore:

- Confidence with new digital and data technology.

### Confidence with new digital and data technology

Charities are increasingly trying to utilise technology to achieve their missions, but there is evidence to suggest that they are not very confident with it:

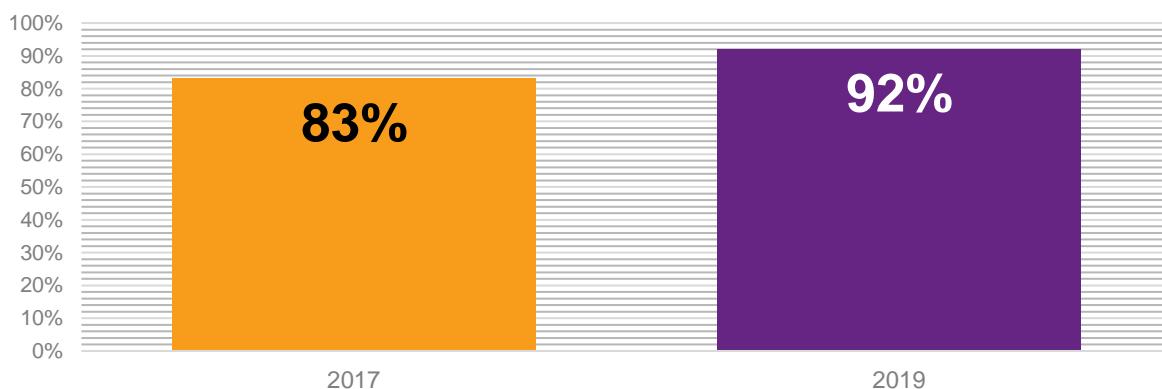
- Over half of charities (52%) who responded to the Charity Digital Skills Survey 2019 (Zoe Amar 2019) have no digital strategy.
- Less than a quarter (23%) have a clear strategy for how digital can help them achieve their charities (Zoe Amar 2019) mission.

Similarly, charities still struggle to use data effectively. Charities need to use data to measure, evaluate and improve their work. According to the Lloyds UK Charity Digital Index 2019, only 49% of charities say that they were able to use data to improve products and services (Lloyds Bank 2019).

### Before Covid-19, charities were growing in confidence on using data to measure their work

95% of respondents to our survey agreed that using data and evidence were important for achieving their mission. This is a big jump from 2017 when, although the questions are not directly comparable, only 72% of charities thought that the results from learning and evaluation were important.

**Figure 6: Charities making a change as a result of their learning and evaluation in the last three years**



*Base: All respondents 2017 (n=300); 2019 (n=300)*

When we look at how our respondents actually use that data, 89% of those we surveyed think that they are good at evaluating their work. Specifically, 92% said they have made a change as a result of their learning and evaluation (up from 83% in 2017).

It is interesting to contrast charities' own perceptions of their skills with the data we have from the Lloyd's Digital Index, which assesses charities' abilities to perform 'Essential Digital Skills'. In 2019, only 49% of their charity sample could use data to improve their products and services.

While the rise in those saying they have used learning and evaluation to make a change is very welcome, the figure in our survey seems extraordinarily high—especially given what we see at NPC, working closely with many parts of the sector. Was the data the right data and of decent quality? Did they make a change at all? Was that change on the basis of good evaluation and rigorous learning? And if so, was it meaningful enough to improve their service? The gap between charities' perceptions and the Lloyds Digital Index (Lloyds Bank 2019), suggests that charities may be overconfident in their ability to use data to improve their work and help their users.

Having a clear understanding of what one can and cannot do with data is key to a charity improving its impact. The overconfident may not be making the best use of data, which could reduce impact and cause other problems in the long run. The coronavirus crisis will be a test of whether this apparent gap between confidence and ability is real.

### What is the 'right' data?

At NPC, we recognise that different charities have different data needs. We have developed a taxonomy, the five types of data, to help charities understand what they can use data for, and so influence what they choose to collect. The five types of data are as follows:

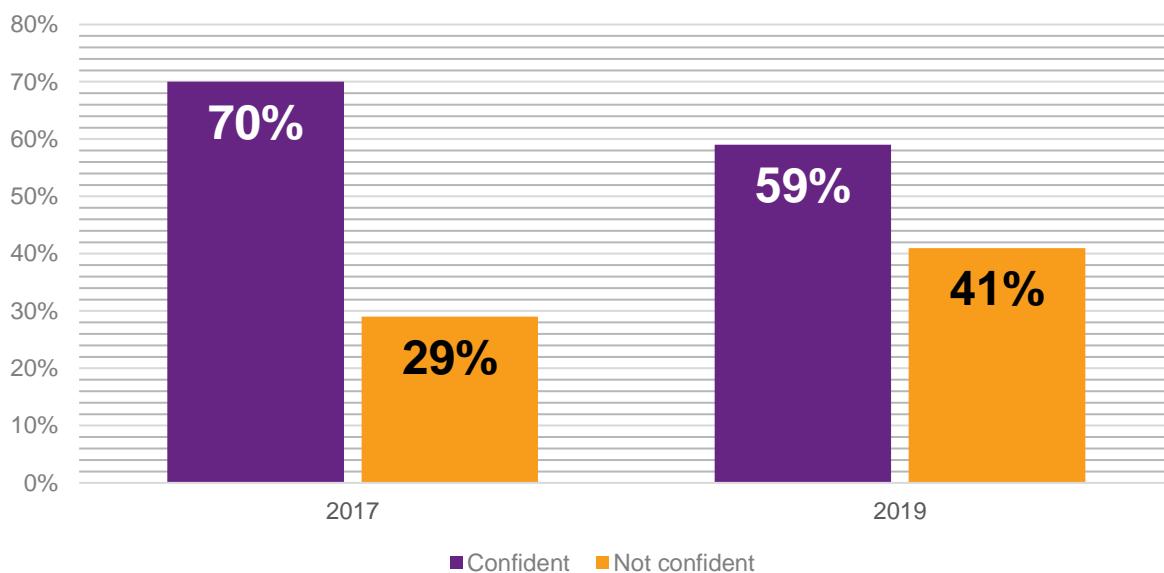
- User data: Which establishes if you reach your service users and their characteristics. E.g. how many people over 70 attended the service?
- Engagement data: Which establishes the extent to which people use your service and how they use it. E.g. how long do people attend the service?
- Feedback data: Which asks what do people think about the service? E.g. would a service user recommend it to someone else?
- Outcomes data: Which tells you how people have been influenced or helped by your service in the short term. E.g. what is different now?
- Impact data: Which establishes the long term difference achieved for individuals, families, communities. E.g. have we seen reduced crime?

This is the NPC view of data. It must be noted that data was not defined to respondents of our survey before they answered the questions. So, when considering their answers, we must be aware that they may be informed by their own individual interpretation of what data is.

## Charities' confidence in digital drops as their skills grow

We have seen the transformational and disruptive power of digital technology in other sectors, yet the charity sector has been slow to catch on. There is huge potential for charities to do so. Our respondents recognise this trend, with 89% seeing digital technology as important to them for achieving their mission.

However, we were interested to find that, compared to 2017, charities' confidence in making the best use of digital technology has declined by 11 percentage points to 59% from 70%.

**Figure 7: How confident are you that your organisation is making the best use of digital technology?**

*All respondents 2017 (n=300); 2019 (n=300)*

This fall in confidence was driven by small and medium (from 73% to 62%) and large charities (from 72% to 55%), although the decrease was not significant for major organisations.

At the same time, evidence suggests that charities' skills in using digital are on the rise:

- Lloyds' UK charity digital skills index tells us that the percentage proportion of charities which have all the key skills necessary to operate today, has been rising since 2017, although only 56% of charities have what Lloyds term the 'full essential digital skills' (Lloyds Bank 2019).
- Many more of our respondents than in 2017 highlighted a lack of skills as a barrier to engaging with digital technology (from 32% to 46%).

We believe this suggests that, as charity leaders have become more familiar with digital, they have become more aware of their organisation's skills gap, which may be why their overall confidence has reduced. Put simply, the more you know, the more you realise how much you don't know.

It is interesting to contrast this with charities' perspectives on their use of data and evidence, where the opposite is happening. It may be that charities' lack of data knowledge is leading to an overestimation of their abilities.

In both cases, filling a skills gap is difficult. It's hard to know what skills you may be lacking, and the perception that the sector offers lower wages than other sectors makes it hard to recruit. It will be even harder to fill these gaps now, with recruitment for most on hold. This is unfortunate as now is a moment in which digital and data skills are needed urgently.

## 3. Charities in a changing world

### In this section we explore:

- Capacity, funding and relationships with funders.
- Diversity and user involvement.

### Capacity, funding and relationships with funders

It is important to remember that before the crisis, charities were already facing a tough context. An uncertain economic outlook meant that charities were ‘likely to face continued demand for their services and support, as the individuals and communities they serve struggle to make ends meet,’ according to research by NCVO (NCVO 2020). Meanwhile, charity closures increased by 27%, to 666 between 2017 and 2018 (the most recent available data) (May 2019).

At the same time, funding was not rising to meet the challenge. The most recent NCVO Almanac data from 2016 / 2017 (NCVO n.d.) suggests that there was a 2% growth in income for the sector, driven by ‘increasing income from investments and from the voluntary sector,’ however funding from individuals and government fell during the same period.

Even at this early stage, it is clear that the crisis has amplified many of these pre-existing trends. The short-term fundraising schedule has been obliterated. The economic crisis which will follow will severely hamper charities’ abilities to raise money from the public, trading arms and investments. Will new funding models arise, or can independent funders and government fill the gap?

### Charities were stretching their resources even before the crisis

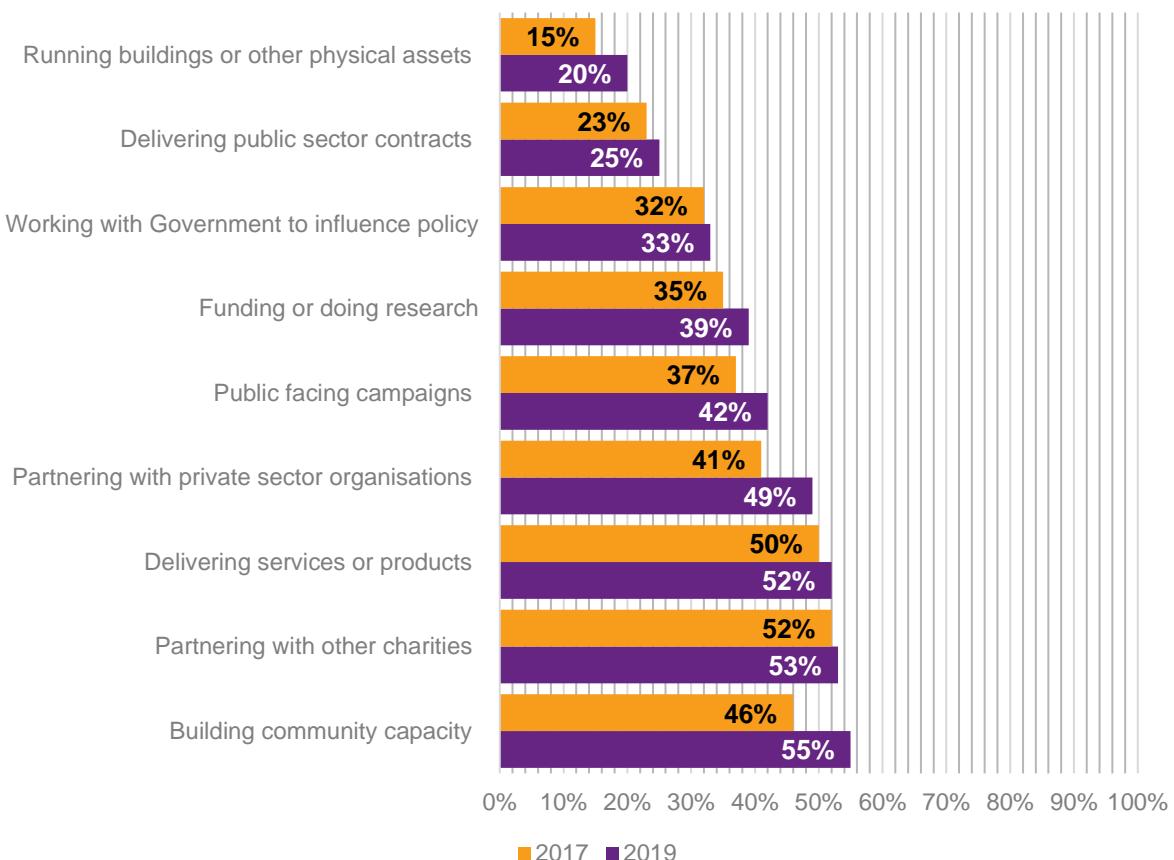
We asked our respondents about which of their activities they expect to do more or less of in the future, and we compared their answers to the same question in 2017.

In 2017, most respondents said that they would expect to do more or about the same of each activity in the future, while only a very small proportion said they would expect to do less of each activity.

The answers charities gave this year indicate that this prediction came true. When asked about what activities they do currently, across every activity, a higher percentage of respondents told us they carry it out now.

We also asked charities to tell us what activities they expected to do in three years’ time. Compared to 2017, charities again expected to be doing even more of everything in future. The most significant jump is in the expectation that they will be building community capacity, from 46% in 2017 to 55% in 2020.

We know from the NCVO Almanac that the charity sector is growing its revenue, but only by 2% across the sector in the last year that we have data for. Much of this growth in revenue has been captured by the largest organisations, with less for small and medium sized organisations (NCVO n.d.).

**Figure 8: Expected activities in three years' time (percentage who expect to do 'more of this')**

All respondents 2017 (n=300); 2019 (n=300)

It is hard to square this modest overall increase in sector income with the ubiquity of charities telling us that they expect to do substantially more and that they are not planning on scaling anything back.

This suggests that, even before coronavirus, charities were spreading themselves ever thinner across a broadening number of working areas. We cannot quantify the risk this now poses, but it is logical that already overextended charities will be hit the hardest by a sudden explosion of demand and a reduction of funds.

The growth in the number charities which were planning to work on building community capacity is an interesting development, which may reflect the long-term trend within the sector towards thinking about building local resilience. With so much of the Covid-19 response happening at a community level, we hope these efforts have had an impact.

## Charities had generally positive views of their funders, but said they needed more core funding

For the first time, we asked charities for their opinions on the trusts and foundations which give them grants. The charities we spoke to generally expressed surprisingly positive opinions of their independent funders, but pointed to two areas where they believed funders could do better:

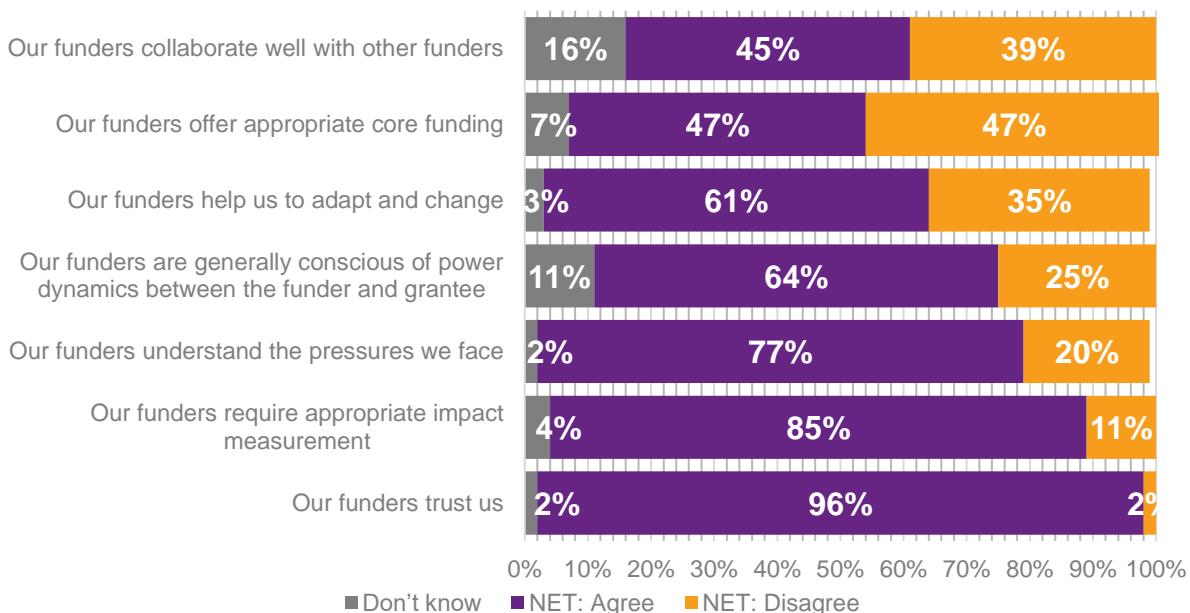
- Core funding.
- Collaboration with other funders.

Of the charities which receive money from independent funders:

- 96% thought their independent funders trusted them.
- 85% thought their independent funders required appropriate impact measurement, and this was largely consistent across different sized charities.
- Across some metrics, small and medium sized charities seemed to be the most positive about their funders: 81% agreed with the statement 'Our funders understand the pressures we face' compared to 70% of major charities (although this difference is not statistically significant).
- Major charities were more likely than small and medium organisations to think that funders offered appropriate core funding (53% vs 42%), though this is within our margin of error.

This positive picture is perhaps a little surprising to those who talk to charities regularly, but it offers some hope in the current crisis. If funders continue to understand the pressures that charities face and are proportional in what they ask for, charities should have the flexibility they need to tackle the crisis effectively.

**Figure 9: Charities' impressions of their funders**



However, there were concerns around core funding:

- Although 77% of respondents to our survey said their funders understood the pressures they face, only 47% thought that they offered appropriate core funding. There is an interesting conflict here which is worth investigating.
- Major charities were the most likely to say that funders offered appropriate core funding (despite generally being in a better position than smaller charities to access unrestricted funding from the public) but the least likely to say that funders understood the pressures they faced (despite presumably having the most resources to communicate with funders).

The flexibility offered by core funding is vital to helping charities manage an evolving situation like the coronavirus crisis. Many funders will have heard about its importance before, but we urge them not to tune out. Now more than ever, funders should be considering whether to offer it, and if not, why not?

Finally, only 45% of charities thought that their funders collaborated well with other funders. Coronavirus has driven action in this area with encouraging examples of collaboration, such as the London Funders pledge (Funders n.d.). But we hope funders reflect on our findings and do more to work together in a sustained way.

#### What is core funding?

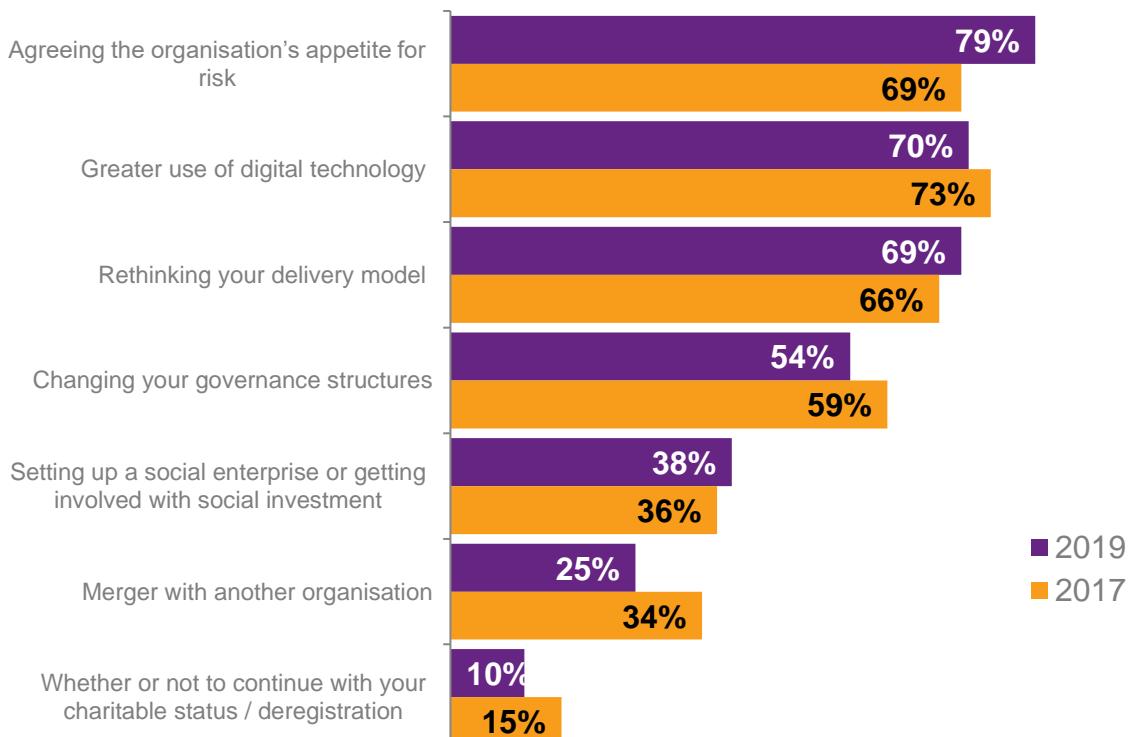
Core funding is a grant which goes beyond the basic cost recovery of a project, and instead covers the 'core costs' a charity incurs in support of their project delivery. This includes overheads, such as HR or operational and office costs, but the charity also has discretion to use the funding to support its delivery where it sees fit.

Sometimes a 'core' element is included by the charity in its costings for delivering work, but many funders do not consider it to be a project cost. NPC has advocated for funders to consider providing core costs, as this means that charities can be more flexible, professional and more likely to continue to have an impact into the future.

## Governance: charities may not be having the tough conversations

When we did our survey earlier this year, Charities could not have known the hard times that were ahead. But we are concerned that they may not be going into the crisis with the right strategic mindset. We found that, since 2017, the number of respondents who reported having discussions at board level across a number of strategic topics, regarding the shape and status of their organisation, has dropped.

**Figure 10: Issues discussed at board level over the last 12 months (% who say each of the following)**



Base: All respondents 2019 (n=300); All respondents 2017 (n=300)

This was despite both the actual and expected increases in charity activity (discussed on page 23) and the previously anticipated flat funding picture for the sector in the coming years, the combination of which we would have expected to lead to some difficult conversations.

We saw an interesting, but not generally statistically significant, trend towards charity boards spending less time discussing the structure of their organisation. Even before the crisis, this was important as it can affect a charity's ability to achieve its mission. Fewer charities reported discussing changing governance structures (54% in 2020 vs 59% in 2017) and whether or not to continue with their charitable status (10% vs 15%), though this is within our margin of error.

A significant finding, with a bearing on the current crisis, was that fewer charities had discussed merging with another organisation (25% vs 34%). In times of financial crisis, mergers can be a solution that protects the continuity of charities services. However, we know from our research, *[Mission and Merger](#)*, that they require a significant amount of discussion at board level in order for them to be possible. The fact that discussions on this topic seemed to be falling suggests that charities will not have laid the groundwork that could help them now.

We did see a small, but not significant, uptick in the proportion of charities discussing their delivery model (69% vs 66%), which may be helpful now. But it is the broader strategic considerations that are also vital for charities to have considered if they are to meet the needs of their users in the new context. So, it is unfortunate that we were seeing less strategic discussion, and it may leave charities less prepared than they might have been for the changes that this crisis will now force on them.

## Diversity and user involvement

When we undertook our survey pre-covid, power, diversity and user involvement were major topics in the sector, and with good reason. It is still the case that less than one in ten voluntary sector employees (9%) are from Black, Asian or minority ethnic groups (BAME), a lower proportion than both the public and private sectors (both at 12%) and a lower proportion than the UK population as a whole (13%) (NCVO 2019).

Away from the demographics of staff, the last few years have seen organisations such as the [National Lottery Community Fund](#) and the [Mayday Trust](#) undergoing high profile strategic shifts to place greater emphasis on the voices of the communities they serve in.

But the Covid-19 crisis puts a forensic lens on the sector efforts. Organisations like #CharitySoWhite have drawn attention to the disproportionate impact the crisis will have on BAME communities. Everyone's experience of life is changing rapidly, and this applies just as much, if not more, to a charity's beneficiaries. Will charities, acting under pressure, prioritise listening to the people they serve?

## Most charities said they thought user involvement was very important

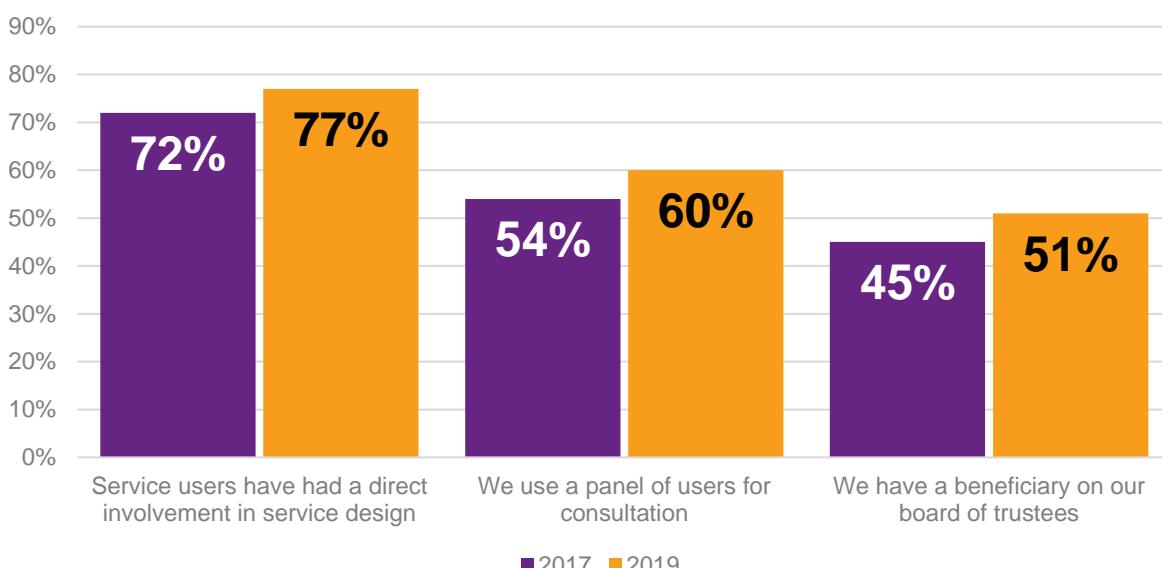
Most charities said they thought user involvement was important and claimed to involve their users in different ways. Yet, in an apparent contradiction, few saw it as one of their greatest assets.

- 91% of charities thought user involvement in the design or deliveries of services was important for achieving their mission.
- 78% of charities said they had made a change as a result of user feedback.

- The percentage of charities who claim to have involved a user in different ways seems to have grown. In 2020, 71% of charities claimed that users had direct involvement in the development of their strategy, compared to 65% in 2017.

These findings are moving in the right direction but none of the trends are yet significant enough for us to be confident that change is really happening.

**Figure 11: Engagement with users**



*Base: All respondents 2019 (n=300); All respondents 2017 (n=300)*

An interesting, but not significant, trend was that small and medium charities seemed to be more likely to involve their users in certain ways than major charities. They tended to be more likely than major charities to have a user on their board (57% vs 46%), a user delivering services (63% vs 56%) or a user involved in developing campaign messages (62% vs 49%). However, major charities seemed somewhat better at involving users in strategic decision-making, and at having a panel of users for consultation (68% major, 61% large and 55% small and medium).

11% of major charities thought they needed to recruit more people with lived experience to become more diverse. This is compared to 6% of small and medium charities, which is interesting but not a significant difference.

#### What is user involvement?

The phrase 'user involvement' could refer to a huge range of activities, from research a charity carries out, to its governance, or its delivery model. At its most general, we think it means involving and responding to the needs of people who use their services / receive a charities' support.

#### Despite praising it, charities don't rank user involvement highly compared to other priorities

When we asked charities in an open question to name their greatest strength for achieving their mission, only 14 out of 300 charities mentioned their service users. This ranked 11<sup>th</sup> out of all the answers given, and was lower than volunteers, governance, and collaboration.

Although 91% of charities agreed, when prompted, that user involvement was important for achieving their mission, when we asked them what would most help the sector have more impact in society, only 9 in 300 (3%) mentioned working more closely with users or communities.

Our respondents were more likely to say that ‘action by regulatory bodies’ and ‘more partnership working’ would boost the impact of the sector than more user involvement. In fact, reducing the number of charities was almost as commonly cited as a way to improve impact as user involvement.

The contrasting results of our questions on user involvement could indicate a comparative lack of confidence in users’ abilities, a perception that involvement is not about mission or impact, or that it is simply one of many factors for achieving a charity’s mission. In the current crisis, understanding users’ rapidly changing needs and responding to them will be vital, so we hope the relative importance of involvement increases.

The contradiction also raises the question of why charities, if they think user involvement is so important, do they not commonly think it is important for improving impact? Perhaps user involvement is seen only in moral terms rather than as a route to impact. The danger is that if charities do not involve users properly it can become tokenistic. This is bad for the charity, but more importantly it can disillusion those involved and make them less likely to give their time in the future.

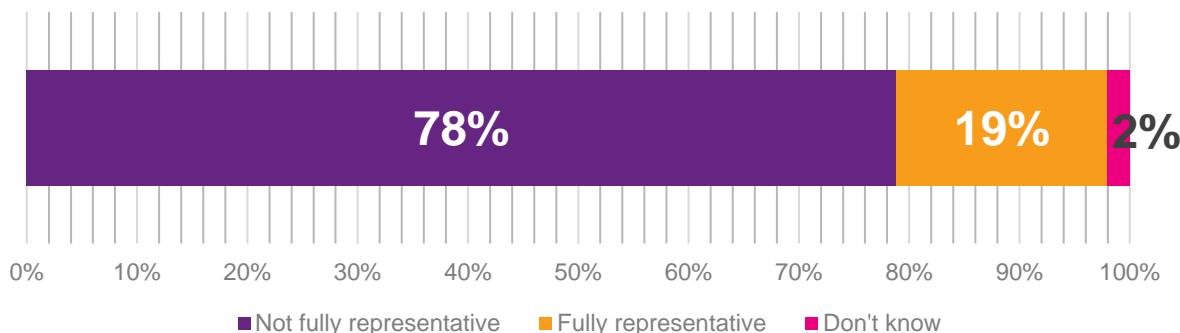
We encourage charities to look at our research [Make it count—Why impact matters in user involvement](#) as a starting point to understand the ‘how’ and the ‘why’ of involving users.

## Charities believe that they have a diversity problem, and it’s worse in larger organisations

Charities perceive that their staff are not representative of the population they serve, across a range of areas. There also seems to be some confusion about which groups they feel they need to recruit more people from.

Four in five charities (78%) say that they think their current staff are not fully representative of the population they serve. This seems to rise to nine in ten (88%) among major charities.

**Figure 12: Perceived representativeness of organisation (percentage who say each of the following)**



Base: All respondents 2020 (n=300);

It is maybe unsurprising that charities are aware of the lack of ethnic diversity in the sector, in light of high-profile research such as the Civil Society Futures inquiry (Civil Society Futures 2018) and ACEVO’s Pay and Equalities Survey 2019 (ACEVO 2019). The question is, does the sector know what to do about it?

- Charities which think their current staff are not fully representative of the people they serve were most likely to say that they needed to recruit people from different ethnicities to improve their diversity (41%).

- Small and medium sized charities seemed much more likely than larger ones to say that they needed to recruit people of different ages to address their diversity issues (18% compared to 6% of large and 8% of major organisations).
- Small and medium and large charities seemed much more likely than major charities to say that they didn't know who they needed to recruit to become more diverse (18% and 19% vs 8% of major charities).
- Worryingly, only 16% of charities thought that they needed to recruit more disabled people to be fully diverse. This number remained low across all different sizes of charities, as well as different sectors. This indicates that charities may be oblivious to the issue. The British disability employment gap stands at 30 percentage points (Hoque n.d.) and ACEVO's Pay and Equalities Survey 2019 (ACEVO 2019) shows that disabled people are underrepresented at senior levels in the sector.

We need to understand what sort of resources can be developed to help all charities, but especially small and medium charities, to get a clearer idea of their own issues with diversity and representation and what they can do to tackle them—especially while they contend with the pressures of the current crisis.



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