

The Third Sector in Wales: State of the Sector Survey, May 2011 Results



Wales Council for Voluntary Action

June 2011

This report should be referenced as:

WCVA (2011) The Third Sector in Wales: State of the Sector Survey, June 2011 Results.

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Published by

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Executive Summary

In response to the recession, WCVA initiated a series of on-line surveys of third sector organisations in Wales in February 2009. Further surveys have been conducted in July 2009, December 2009-Jan 2010, June 2010, September 2010, December 2010 and May 2011. There were between 480 to 750 responses to all surveys from a variety of organisations from all parts of the sector, all parts of Wales and representing both large and small organisations.

The survey findings

The surveys have provided evidence of the effect of the recession and subsequent recovery on the third sector in Wales. Whilst the data is not able to provide a comprehensive picture, the responses received are illustrative of the situations of many organisations in Wales.

The June 2011 survey has shown that

- The general outlook for the sector has improved, with 44 per cent of organisations feeling that their situation would deteriorate over the next twelve months. This is a decrease of 3 per cent from the January 2011 figure of 47 per cent, and 5 per cent from the October 2010 figure of 49 per cent.
- 46 per cent of organisations predict that their financial situation will get worse over the next twelve months. This is a slight decrease from 48 per cent in January 2011, and a 6 per cent decrease from 52 per cent in October 2010.
- Looking back at the financial performance of organisations over the second quarter of 2011, 35 per cent of organisations reported that their financial situation had worsened. In October 2010 and January 2011, the figures were 28 per cent and 32 per cent respectively, indicating a decline of recent financial health.
- Since the survey began in December 2008 a minimum of 726 posts have been reported to have been made redundant in Wales. The number of organisations reporting redundancies (50) and the quantity of redundancies in this survey (146) has increased considerably since the last survey, where 20 organisations reported 50 redundancies.
- This increase in redundancies was predicted in our last survey, where posts reported at risk increased from 295 in October 2010 to 471 in the January 2011 survey. In this survey, a total of 69 organisations have reported 156 posts are at risk. This is a large decrease from January 2011, and hopefully means that fewer redundancies will be made in the near future.
- A third of volunteer involving organisations report an increase in the number of volunteers and expect this trend to continue.

In conclusion, many organisations continue to experience difficulties, reporting a loss of funding and contracts, trouble securing new funding, and increased demand for services. Few groups have the confidence that their situation will improve in the next 12 months. The third sector is being squeezed at both ends, suffering increasing costs and decreasing income. Not only are utility and fuel costs rising, but the costs of legislative and regulatory requirements are also increasing. More complicated funding and monitoring requirements are increasing costs of administering funds for third sector organisations.

Future action

The survey will be repeated in autumn 2011 to monitor the ongoing effects of the recovery, inflation and cuts in public expenditure.

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Introduction

Following on from the survey of third sector organisations conducted in February 2009, further surveys have been conducted in July 2009, December 2009-Jan 2010, June 2010, September 2010, January 2011 and May 2011. Each survey gives us a snapshot of how the third sector in Wales is coping during these turbulent economic times. Information about how the third sector in Wales was affected by previous recessions is not available. The WCVA Recession and recovery surveys aim to provide new Welsh research and insight that can help fill some of these knowledge gaps.

The June 2011 survey has reflected the cautious optimism that organisations expressed in the previous survey, with general and financial outlooks improving. While the past few months have been difficult, with redundancies almost trebling from January 2011 and finances under strain, the latest survey has shown that organisations are predicting a brighter future. Major restructuring and mass-redundancies are declining; redundancies are more likely to be single posts as of when absolutely necessary. Painful action taken to shield organisations from funding cuts and declining income revenues appear principally to have already been implemented, and are showing signs of effective progress.

The June 2011 survey was carried out after the start of the new financial year and the conclusion of grant and finance applications, so organisations could access their health with increased clarity and confidence. It has also become increasingly clear that the Welsh Assembly Government has cushioned the Welsh Third Sector from the public spending cuts. Welsh Third Sector organisations show more confidence than their counterparts in England, and Wales is becoming more aware that Conservative-Liberal Democrat policy in Westminster has a limited weight. Two of the most controversial political policies debated in the mainstream media; increases in tuition fees and reform of the NHS, do not affect Wales and devolved policy.

The aim of our reports is to provide an evidence base for public policy makers and to enable comparisons between the sector in Wales and other parts of the UK and between the third, business and public sectors in Wales. Current UK research may not give an accurate picture of Welsh third sector organisations, and the views of leaders of large UK organisations may not be representative of the many small local and regional groups across Wales. Within the Welsh third sector, there is a further diversity of size, purpose, location and structure. The WCVA hopes to gather information through surveys every four months to gain an understanding of the impact of the recession and the effect of any interventions.

This report will review the first half of 2011, and look forward to the third and fourth quarters. WCVA will try to predict trends, challenges, and opportunities that the Welsh Third Sector should be aware of over the coming year.

The Economic situation in Wales

Welsh statistics for the second quarter of 2011 show an improving economy¹.

The unemployment rate fell to 7.9 per cent in April 2011 (from 8.7 per cent in January 2011). This is still higher than the UK rate, which is 7.7 per cent. The April 2011 ILO unemployment figure was 115,000 (down from 126,000 from January 2011), and there was a fall in the number of people in Wales claiming out of work benefits, down to 292,700 (from 296,900 in January 2011).

Manufacturing jobs in Wales rose by 11,000 (7.8 per cent) over the year to March 2011, whilst manufacturing jobs in the UK as a whole fell by 1.1 per cent. Manufacturing remains one of the few sectors to be resilient to the economic downturn in Wales. Manufacturing is also essential to any economic recovery in Wales, given its importance in the private sector.

The housing market in Wales has continued to struggle, with minimal growth. Average house prices in Wales rose by 0.6 per cent in the first quarter of 2011. This is worse than the UK average where house prices rose by 1.0 per cent². As with the previous quarter, there are also strong regional disparities within Wales. North Wales experienced the strongest house price rises over 2010; average prices in Wrexham rose by 4 per cent year on year. South East Wales was the weakest performing area; Blaenau Gwent, Caerphilly, Merthyr Tydfil, Monmouthshire, Newport and Torfaen all reported weak housing markets.

In the previous survey report, WCVA highlighted that pensions may be an important issue for the Third Sector in 2011. *“If Unions try to stop pension changes, then there may be public service disruption due to strikes. In addition, decisions made on Public Sector pensions, such as possible higher employer contributions, may influence changes to pension payments for Third Sector organisations.”*

Public Sector Unions have threatened mass strikes in the UK over cuts to Public Sector pensions. While this is the only issue recently that they can legally call for strike action for, Unions have highlighted that there is also huge anger over mass redundancies, privatisation and reform. Public Sector pension reforms may be a catalyst for wider unrest and disruption to the UK and Welsh economies.

Interest rates are the same in the whole of the UK and remain unchanged at 0.5 per cent. While the economy remains in a weak condition and inflation is not too concerning, the Bank of England is unlikely to increase rates. However, more Bank of England members voted to change interest rates than at the previous vote.

Looking forward, though, there are concerns regarding the effects of benefit changes and organisations supporting people experiencing poverty are reporting increases in the number of people supported compared with a year ago³. A recent report predicts that 62,000 current Incapacity Benefit claimants may be moved to Job Seekers Allowance and in time, 30,000 of these will be removed from the benefits system altogether. The loss of

¹ June Economic Statistics, June 2011, Statistics Wales, accessed at <http://wales.gov.uk/docs/statistics/2011/110617sb512011en.pdf>

² Quarterly House Price Index, 31st December 2010, Nationwide, accessed at http://www.nationwide.co.uk/hpi/historical/Q4_2010.pdf

³ Wales on line, 13th July 2011, accessed at <http://www.walesonline.co.uk/news/wales-news/2011/07/13/charities-to-examine-impact-of-cuts-as-they-warn-of-age-of-austerity-in-wales-91466-29042914/>

income for these people, combined with the lack of new employment for those now expected to seek work is a depressing thought⁴.

This reminds us that any Welsh recovery is fragile, so any future growth is likely to be cautious, rather than miraculous.

⁴ Tackling Worklessness in Wales, C Beatty & S Fothergill, Centre for Regional Economic and Social Research, Sheffield Hallam University, July 2011

The survey

A full description of the survey and an analysis of the survey respondents are provided in Appendix 1.

The survey was a bilingual, on-line survey, carried out between 16th May and 13th June 2011, to which 6,785 organisations with an email address on WCVA's database of organisations which work in Wales were invited to respond. The survey was also accessible from the WCVA website, and it was promoted in WCVA newsletters. After three weeks, organisations which had not responded were reminded by email.

There were 545 visits to the on-line questionnaire, of which 57 contained no useful data and 6 were duplicates of other entries. These multiple entries were resolved to one response per organisation. This gave 482 valid responses.

Responses came from organisations with a range of incomes which work at a local, regional or national (all Wales) level. Their postal addresses were distributed throughout Wales. About 32 per cent of respondents were registered charities, with about 14 per cent being Companies limited by guarantee. Just 4 per cent were unincorporated associations or informal groups. Twenty four (5 per cent) of the valid responses were provided through the medium of Welsh.

Results from the survey

General attitude to the future

The June 2011 results show that 45 per cent of respondents felt that in general, the next twelve months would get worse. This is a slight decrease from October 2010 (49 per cent) and January 2011 (47 per cent). The number of organisations who feel that it would improve remained increased to 16 per cent. Thirty nine per cent of respondents thought that there would be no change in the general situation, which is no change from January 2011.

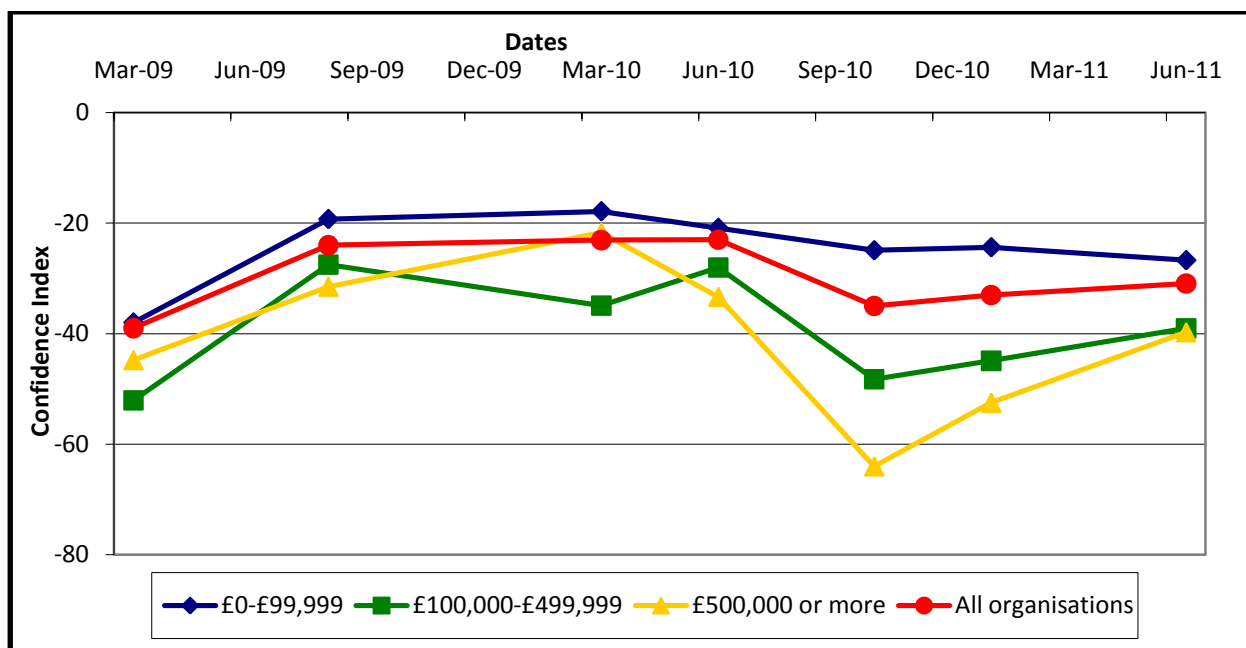
The confidence index⁵ shows that confidence overall in the general future of organisations increased by 2 points again from -33 points in January 2011, to -31 points in June 2011 (Table 1). Confidence in income bands £250,000- £999,000 increased considerably. Other organisations either remained stable, or declined slightly in their confidence.

Table 1: The Confidence Index of organisations in regards to their general future over the next 12 months by income band, March 2009, August 2009, March 2010, June 2010, October 2010 and January 2011.

Income band	Confidence						
	Mar-09	Aug-09	Mar-10	Jun-10	Oct-10	Jan-11	Jun-11
1. Less than £10,000	-27	-13	-12	-9	-25	-25	-25
2. £10,000 - £99,999	-36	-24	-26	-35	-25	-23	-28
3. £100,000 - £249,999	-61	-41	-33	-36	-46	-36	-42
4. £250,000 - £499,999	-51	-41	-38	-18	-54	-60	-32
5. £500,000 - £999,999	-63	-58	-17	-45	-75	-48	-17
6. £1,000,000 or more	-37	-24	-18	-25	-60	-55	-54
All organisations	-39	-24	-23	-23	-35	-33	-31

⁵ The confidence index = percent of respondents feeling things will improve - percent of respondents feeling things will get worse over the next 12 months. A number greater than zero indicates a greater proportion of respondents feel things will get better, a number less than zero indicates that a greater proportion of respondents feel that things will get worse.

Figure 1: The Confidence Index of organisations in regards to their general future over the next 12 months by paired income bands, March 2009, August 2009, March 2010, June 2010, October 2010, January 2011 and June 2011.

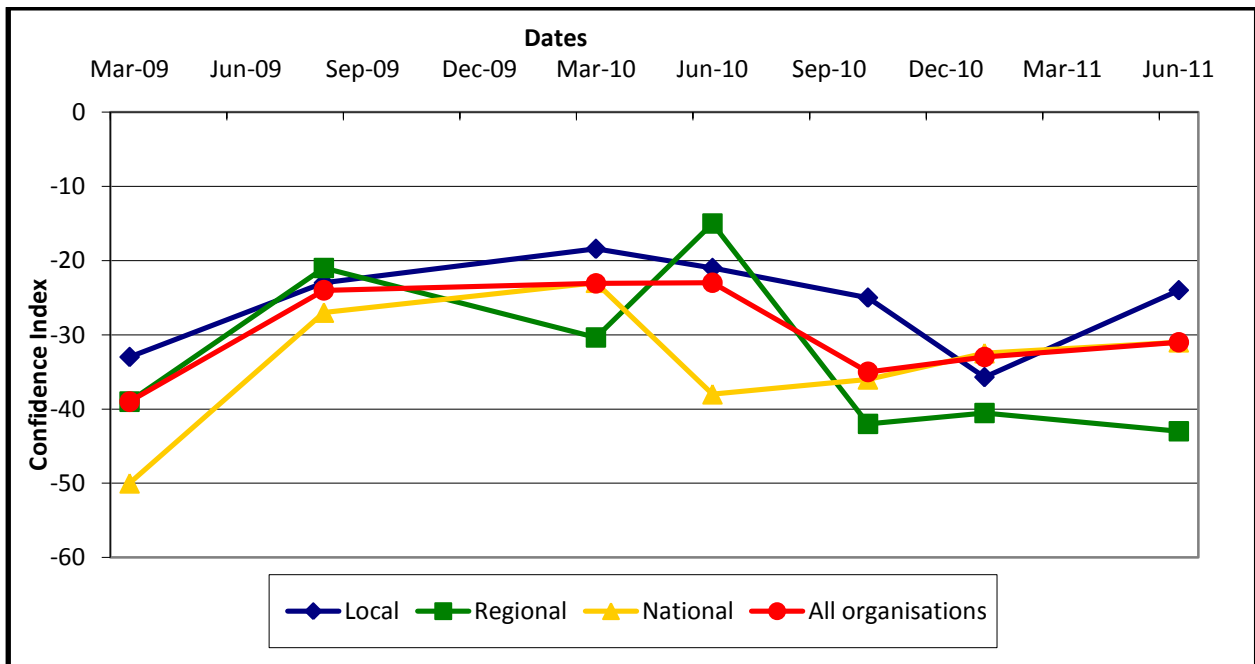


In addition, analysis of local, regional and national organisations shows that organisations overall have increased in confidence slightly to -31 points from -33 in January 2011. Local organisations have regained on the Confidence Index in a surge of optimism, now with -24 points (Table 2 and Figure 2). The conclusion of grant applications may have been better than expected, with the start of a new financial year bringing secured income streams. Regional organisations have decreased in confidence slightly and are the most negative with -43 points, while national organisations remain stable at -31 points.

Table 2: The Confidence Index of organisations in regards to their general future over the next 12 months by organisation coverage, March 2009, August 2009, March 2010, June 2010, October 2010, January 2011 and June 2011.

Area served	Confidence						
	Mar-09	Aug-09	Mar-10	Jun-10	Oct-10	Jan-11	Jun-11
Local	-33	-23	-18	-21	-25	-36	-24
Regional	-39	-21	-30	-15	-42	-41	-43
National	-50	-27	-23	-38	-36	-32	-31
All organisations	-39	-24	-23	-23	-35	-33	-31

Figure 2: The Confidence Index of organisations in regards to their general future over the next 12 months by organisation coverage, March 2009, August 2009, March 2010, June 2010, October 2010, January 2011 and June 2011.



Comparison of NCVO and WCVA data from February 2008 to January 2011

The Confidence Index shown by NCVO surveys began a year earlier than that of WCVA, which unfortunately reduces data for analysis. However, from early 2009, it is possible to discern that national voluntary organisations were more confident than Welsh voluntary organisations. Confidence shown by the NCVO surveys declined rapidly from 2009, to an all-time low of -50 points in January 2011. Surveyed again in May 2011, this trend has reversed, to -21 points. Confidence in Welsh voluntary organisations surveyed by WCVA has been much more stable, but has declined since June 2010. The most recent surveys represent a switch, as the confidence reported by NCVO is now less pessimistic than that reported by WCVA.

Table 3: Confidence Index of the general future over the next 12 months. A comparison of NCVO and WCVA data from February 2008 to January 2011.

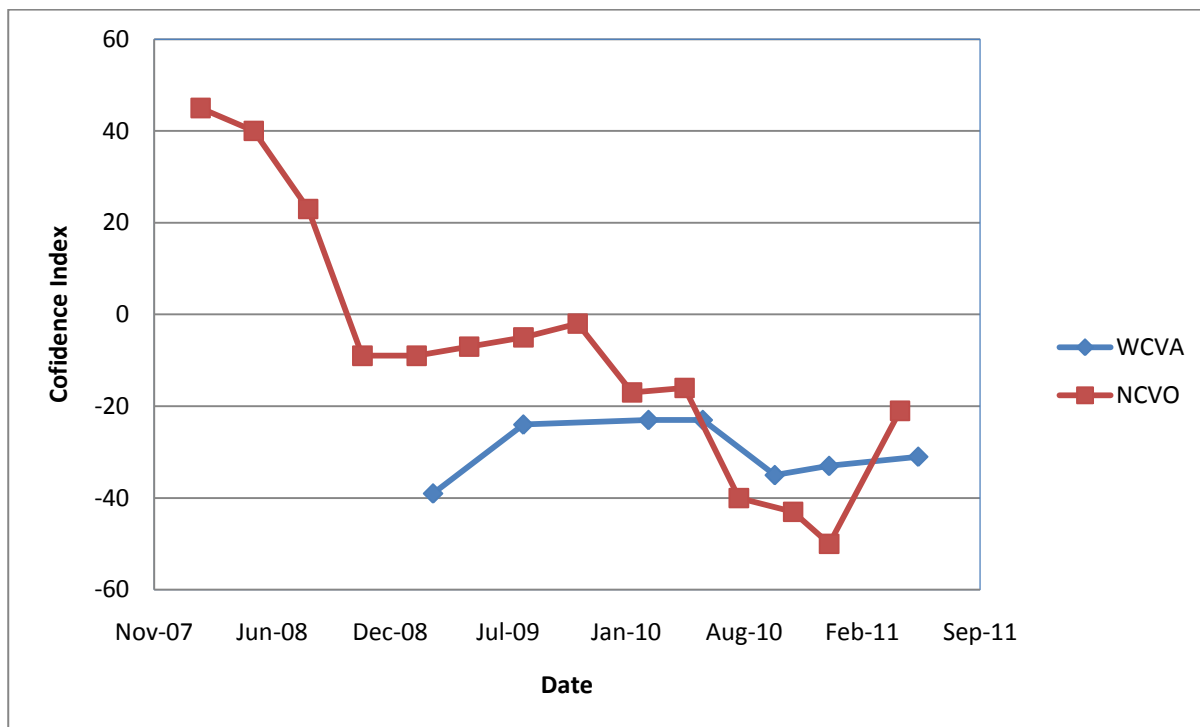
	WCVA	NCVO
Feb-08		45
May-08		40
Aug-08		23
Nov-08		-9
Feb-09		-9
Mar-09	-39	
May-09		-7
Aug-09	-24	-5
Nov-09		-2
Feb-10		-17
Mar-10	-23	
May-10		-16
Jun-10	-23	
Aug-10		-40
Oct-10	-35	
Nov-10		-43
Jan-11	-33	-50
May-11		-21
June-11	-31	

Organisations' concerns for the future

The limited availability of funds continues to take its toll on the third sector. Membership organisations and those dependent on voluntary income are suffering due to the restricted disposable income and insecure circumstances of service users. The comment below is a common theme among organisations providing sport and leisure facilities, conferencing and catering services, and services in deprived communities.

“The main effects are the members ... of our organisation are so strapped for money due to unemployment and being in college that they cannot pay subscriptions to support the club finances. Although in the past receiving help financially for certain outgoing expenses to balance the books has been achieved I think that this year it will not be so easy due to the current economic downturn and its effects on the third sector.”

Figure 3: Confidence Index of the general future over the next 12 months. A comparison of NCVO and WCVA data from February 2008 to January 2011.



Contracts and funding

Third sector organisations that are in receipt of contracts and funding from statutory bodies and other organisations raised concerns with regard to a reduction in the total funds available, changes being made to criteria, and delays in decision making. Organisations have been frustrated by the lack of consultation and engagement; kept waiting for decisions to be made that affect their ability to operate. Such actions are having a direct impact on the ability of organisations to deliver services and plan for the future. Uncertainty and redundancies have affected staff morale, and additionally impact the sector, due to the loss of expertise.

“Late decisions in funding are affecting our ability to make long-term plans for the future of our organisation.”

“Late decisions are a nightmare and we have to juggle and hope for the best never knowing what will happen ... We can’t plan our service we just try our best with the resources we have.”

“Our biggest difficulty was due to excessive time delays by WAG and WEFO ... By having to wait over 10 months for decisions, we had to make redundancies and this affected us hugely.”

“It has been very difficult to engage with commissioners about ongoing funding and negotiation around extending service agreements.”

“The lack of consultation about any reviews or changes does not help build a full and comprehensive picture on which to make decisions.”

Some cuts are affecting building work that is currently being carried out, or needs to be.

“Building projects that are still going ahead are subject to reductions in the original budget - this leads to developers wishing to reduce accessibility and consulting us on which aspects of inclusive design can be abandoned!”

Several respondents commented on the need for longer term funding, to allow third sector organisations to plan and deliver projects effectively.

“Projects such as ours need longer term secured funding to allow us to continue and develop its services that provide support and crisis intervention. Any potential changes need to be in full dialogue with those that provide these grass roots services to allow timeframes to be drawn up and limit the impacts on our service users.”

“Charities need to have 3 year contracts for funding as per the WAG funding policy.”

Proposed changes to statutory funding are resulting in negativity within the third sector, including an increasing trend for third sector organisations having to compete for funding against the public sector. Some statutory bodies have also implemented a ‘retendering’ process for contracts that have already been awarded. The amount of work that goes into funding applications is also having an effect on organisations, staff workload and morale, and their ability to deliver services.

“The proposed transfer of Supporting People Revenue Grant funding from the Welsh Assembly Government to local authorities could impact on the future of our service in relation to local strategies and local strategic relevancy of service.”

“Too many funding streams that were available to voluntary orgs only, some years ago, are now being gobbled up by local authorities for example, what changed to allow this to happen?”

“Current SLA has been included as match funding by Local Council, forcing us to tender for a 'revised' SLA under EU rules. Any council work has to go to tender and this includes our former SLA.”

“The amount of work that has to go into funding bids on top of running the service is impossible. We work at other jobs to keep us going financially in order to keep our service going!”

“[We are] keen to become more sustainable by working with a wider range of local authorities and sectors. However, we are still reliant on funding streams and have increasingly found the following: Trying to get funding is more time consuming and chance of failure is higher.”

Sustainability

Some respondents commented that self-sustainability has become a key priority, which will result in organisations becoming more ‘businesslike’, with contingency plans in place to address funding cuts. However, this is often reliant on an initial grant or funding, which has not necessarily been secured at the time of completing the survey.

“As an organisation we have ... reflected and planned how we can move forward sustainably - hence our move from Pembrokeshire into Swansea, where we have carried out lots of project work over the years. And the potential for future synergy is far greater. With the move we also have a fundraising plan in place and will resume applying for grants.”

“We have had a Business Review carried out by a consultancy agency, and a business plan produced. The outcome is that we are able to become sustainable with initial start up grants for staff funding and large capital funding to alter our facilities. Applications have been submitted and we are awaiting the outcome. The proposed future developments mean that we have to alter our staff structure and become business focused.”

“One of the objectives of the Centre is to be self sustainable, and with the decrease in funding etc it has a knock on effect to service providers such as ourselves.”

Regional variations

Organisations operating at regional and national levels were in a position to comment on variations experienced when dealing with different local authorities.

“Local Authorities slow making funding decisions this year. It will mean we may not have a presence in 5 out of the 22 counties.”

“Some local authorities have taken a collaborative approach to addressing their financial issues in negotiation with us and other provider organisations whilst others have taken a more draconian approach of retendering services or imposing arbitrary cuts to funding. In at least one instance a highly successful and well regarded low level preventative service has been terminated in order to save a relatively small amount of money as it is not a statutory service. Whilst saving money in the short term actions such as this will inevitably increase long term costs as service users needs escalate to more critical levels in the absence of low level preventative input.”

Small organisations

There is concern that smaller organisations are losing out to larger, national and sometimes multinational organisations in an effort to make cost savings. Smaller organisations struggle with the requirements of complex tendering processes and are not receiving support, resulting in negativity. Additionally, smaller organisations are sceptical that this will even result in savings as larger organisations are going beyond their remit and do not have the necessary expertise.

“Money needs to be spent supporting smaller organisation in the tendering process and larger ones come in and do not have the local knowledge and end up costing more money than what is currently provided. Money invested in supporting the third sector now would benefit all in the future.”

Soft target

There is a general feeling that the initial expectation of the third sector being a ‘soft target’ for cuts is taking place. As well as increasing negativity towards the public sector, this is

having a real impact on income; as such organisations cannot afford to give pay rises in line with inflation.

“As both central and local government look for cost savings...soft targets like social inclusion will bear the brunt of funding cuts so that more and more work that was previously done by civil servants will not be done unless the voluntary sector does it.”

Concern for communities

Organisations working in areas of Wales suffering high levels of deprivation are concerned about how the communities will cope in the future if funding comes to an end.

“In many areas of S. Wales the world is kept ticking along by volunteers. We’ve had a decade of getting better, but if the sector does not get special attention ... the Valley communities will slump back to slums in 5 years.”

“We are a Communities First partnership and with the uncertainty of the funding to continue after March 2012 the people and groups we support are concerned with what help will be available to them if this funding is stopped. Also we have seen a rise in repossessions of homes within our ward and more people are concerned that no one will be here to give them advice and be able to help with telephone calls and form filling.”

Improvements

Some organisations have made strategic changes in order to lessen the impact of the recession, while others no longer seem to be experiencing negative effects of the recession.

“We have made the strategic decision to move away from grants etc. and focus on provision of paid services. Whilst we are also affected by cutbacks in local authority budgets, by offering high quality services, and working closely with our clients we have seen our revenues actually grow.”

“We have joined forces with 3 child minders. In return for use of our insured premises, toys & equipment, they pay us a nominal weekly rent. They have the skills and qualifications to ensure our not-for-profit Toddlers group is able to continue.”

“We have earned income through commissions which has always been our saving grace! These come from the good relationships we have built over the years, from previous work undertaken and our good reputation.”

“We aren't seeing an economic downturn any more. We had a downturn in 2009-10 following the bank collapse in late 2008, but our financial situation has recovered to where we would have expected to be at this stage.”

Organisations' financial situation over the past three months

The respondents were asked whether the financial situation had improved or worsened over the previous three months. Overall, it had got worse for 35 per cent of organisations in June 2011 (32 per cent in January 2011), not changed for 54 per cent of the organisations (58 per cent in January 2011), and improved for 11 per cent of organisations (also 11 per cent in January 2011).

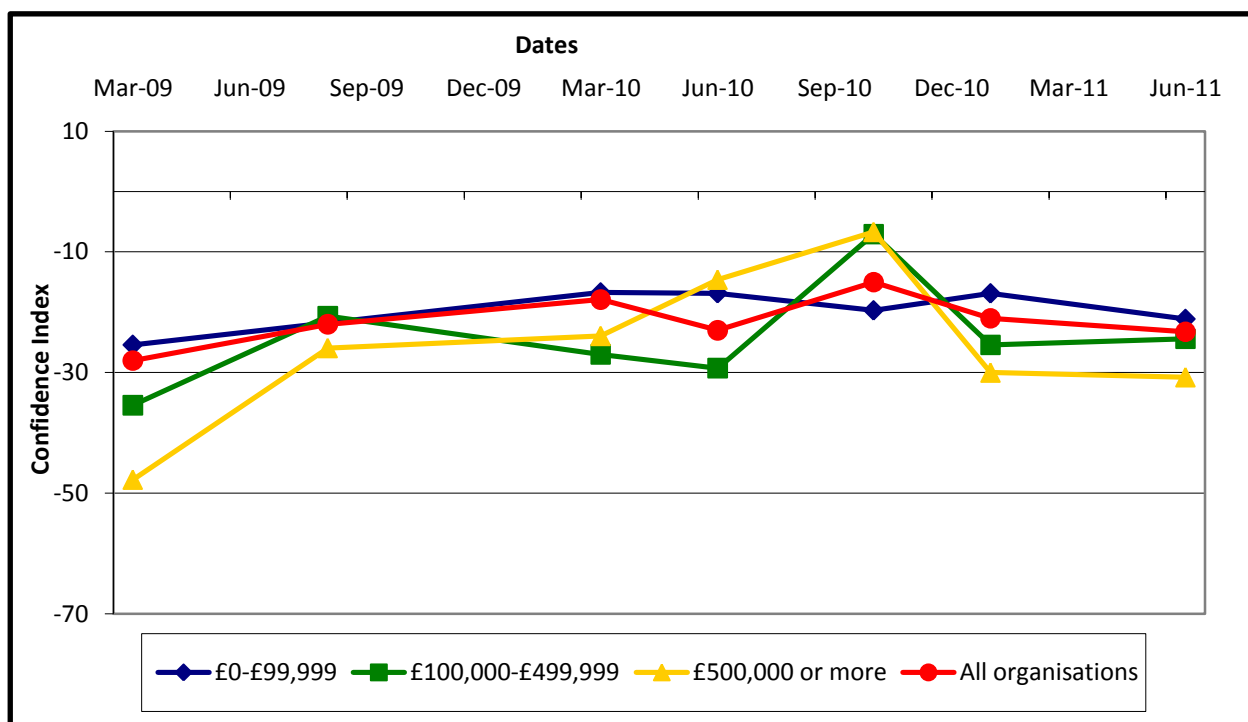
Looking over the past 6 surveys, confidence had steadily climbed since the shock of the recession in early 2009, before slipping in June 2010 as the Welsh Third Sector began to see economic damage filter through to its income streams (Table 4, Figure 4). In October 2010, past performance increased again to a peak of -15 points. In the January 2011 survey however, the index for the past three months decreased by 6 points to reach -21 points.

In June 2011, the index for the past three months shows that performance slipped slightly by 2 points, so confidence is now on -23 points.

Table 4: The Confidence Index of organisations in regards to their financial situation over the past three months, by income band, March 2009, August 2009, March 2010, June 2010, October 2010, January 2011 and June 2011.

Income band	Confidence						
	Mar-09	Aug-09	Mar-10	Jun-10	Oct-10	Jan-11	Jun-11
1. Less than £10,000	-19	-17	-16	-12	-23	-18	-19
2. £10,000 - £99,999	-26	-26	-17	-23	-16	-15	-23
3. £100,000 - £249,999	-32	-20	-38	-32	-4	-25	-23
4. £250,000 - £499,999	-34	-15	-5	-26	-14	-26	-28
5. £500,000 - £999,999	-79	-62	-22	-25	-35	-29	-17
6. £1,000,000 or more	-35	-26	-25	-7	4	-31	-40
All organisations	-28	-22	-18	-23	-15	-21	-23

Figure 4: The Confidence Index of organisations in regards to their financial situation over the past three months by paired income bands, March 2009, August 2009, March 2010, June 2010, October 2010, January 2011 and June 2011.

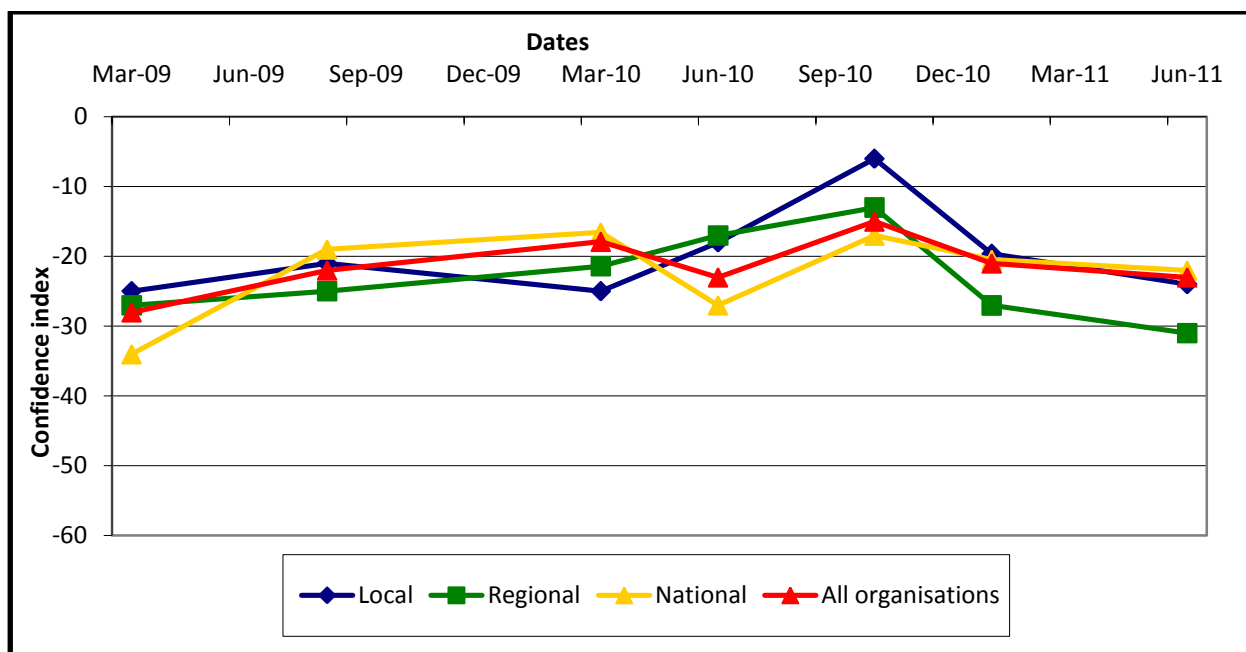


The index for past financial performance (Table 5, Figure 5) shows that organisations have regressed in confidence over the past 3 months, with regional organisations losing confidence points again to reach -31 points. Local organisations have also lost 4 points to record -24 points, and national organisations have lost 2 confidence points to reach -22 points in June 2011.

Table 5: The Confidence Index of organisations in regards to their financial situation over the past three months, by organisation coverage, March 2009, August 2009, March 2010, June 2010, October 2010, January 2011 and June 2011.

Area served	Confidence						
	Mar-09	Aug-09	Mar-10	Jun-10	Oct-10	Jan-11	Jun-11
Local	-25	-21	-25	-18	-6	-20	-24
Regional	-27	-25	-21	-17	-13	-27	-31
National	-34	-19	-17	-27	-17	-20	-22
All organisations	-28	-22	-18	-23	-15	-21	-23

Figure 5: The Confidence Index of organisations in regards to their financial situation over the past three months by organisation coverage, March 2009, August 2009, March 2010, June 2010, October 2010, January 2011 and June 2011.



Organisations' financial concerns

Contracts and funding

Losses of contracts and funding cuts from Local Authorities, Health Boards and other statutory bodies are continuing to result in reduced income for many respondents. Alongside funding cuts, some organisations are not even receiving rises in line with inflation for continuing contracts. Late decision-making continues to leave organisations in an uncertain position, affecting their ability to deliver services and staff morale. The termination of match funding and 'in kind' match funding by some Social Services is having a massive impact on some health and social care organisations and services. Another has seen one Service Level Agreement end, another cut by 25%, and is waiting for a decision on a third.

"Reduction in Supporting People Revenue Grant administered by the Welsh Assembly."

"Although we have had a small increase in our revenue funding from Arts Council of Wales one of our local authorities has cut £2k from their annual support."

"Torfaen C.B.C have been unable to give us the level of support which they previously gave us."

"We have in the past...received very minor amounts from Flintshire County Council from their funding from WAG for the Strategy for Older People. That will no longer happen."

"Funding reduced from WCVA but some help was available to the group."

"Loss of contract income. No inflationary indexing."

“Core funding has not risen to keep pace with inflation and rising costs.”

Some organisations have been left in a position where they do not know if they will have funding they have been granted taken away from them again.

“We were granted 3 years funding by DFID in April 2010 but we are still waiting to hear whether this funding has been taken away from us. We were originally told that we would hear by the end of April but now we have been told that DFID’s review of their policy on grants in the UK has been delayed and they won’t give a date when they will have made up their mind. We only have enough money in the bank to last to 31st May so bankruptcy is becoming more and more likely.”

Others have been informed that funding will be cut and they will be expected to provide the same services for less money; and then told they will receive the initial amount. While this may be considered good news, it leaves organisations and staff in an uncertain position, with little faith in support for the third sector from statutory bodies.

“We were initially notified that the funding we used to receive under the mental health grants scheme which has now passed to LSB would be cut by 4% and despite this we would be expected to deliver the same services. This has now changed and we have been notified that we will receive the same amount of funding as the last financial year. The threat of losing funding for the mental health services delivered from this funding is worrying and leaves us feeling unsettled. There appears to be little understanding of the nature of the third sector and the work we do.”

Some organisations have missed out on grants they previously relied on, primarily due to less total funds being available.

“Reduced funding grants from Communities First Trust Fund.”

“Arts Council of Wales grant ... cut.”

“We used to have a “Penny Grant” (approx. £100 per annum) from the local town council, but that no longer exists.”

“Funding from [statutory body] reduced by £25k this ... year.”

Funding process

Some organisations have become increasingly frustrated with more complicated funding processes, changing criteria and the lack of support for the third sector, and especially small organisations.

“The process with some funding bodies is almost impossible for smaller groups to cope with. Funders are not encouraging third sector groups at all.”

“We were fined for late submission of annual accounts. Something we are not happy about given the circumstances.”

“WAG Communities First changed their criteria which made us ineligible.”

Earned income

Some organisations have experienced a reduction in services on which they relied for a regular income.

“Projects that were using the building and paying rental have closed and so our income has reduced.”

“Customers from local authority have reduced their rental requirement in response to their own budget being cut. Individual users of the facilities have less disposable income. Clients (and staff with children) who use our childcare have been adversely affected by the cuts in childcare tax credit.”

Voluntary income

Membership organisations have experienced a drop in income due to reduced disposable income of their members, as a result of the recession. This primarily affects arts, sports and leisure organisations, but also affects community groups in deprived areas.

“Now our members are less well off we will not be able to give as we have in the past. This means we can do less for our community.”

“Membership levels fallen due to recessionary pressures.”

“Our funding comes from parents paying per playgroup session. As the recession has hit parents, some cannot afford as many sessions, so we get less income.”

“Incomes and expenditure of members has worsened significantly and this has resulted in a massive increase in transportation costs. The club now has to provide at least one mini bus a week at an average cost of about £130 each and this will reduce our end of season balance by approx £2500. This will then have the knock-on effect of reducing the disposable income we have for improvements to ground and facilities, resulting in them taking significantly longer to achieve.”

Groups that relied on voluntary income and sponsorship have lost funding, as private businesses make their own cost savings and individuals have less disposable income.

“Some big sponsorship has been lost this year, while venue costs have increased.”

“The total cost of running the facility comes from fund-raising events organised by and within the community. The cost of electricity and insurance are increasing, and the general economic situation is making it more difficult to raise additional funds.”

Costs

Many organisations are in the position of using up funding reserves to pay for recurring costs, such as utilities and wages.

“The Centre is now paying for 3 staff members out of reserves plus all overheads and maintenance.”

International causes

Charities supporting international causes are finding it especially difficult to obtain funding.

“It’s getting to be really hard to get any form of funding from anybody especially as we serve starving children in another country.”

Some organisations have seen an improvement

Some, albeit fewer, organisations have been successful in obtaining funds or grants, or have received additional voluntary funds. Others have benefited as a direct result of the current economic situation, as their services and activities are in increased demand. This is generally because they offer services that will enable people to make cost savings, such as village halls.

Contracts and funding

Some organisations have made successful funding applications and won contracts. As can be seen from the comments below however, these are generally short-term agreements of up to 12 months.

“[We have had] success in fundraising applications and increased demand for services.”

“Local Authorities have agreed funding some times for the whole year and some for part of the year.”

“[We] received funding from The National Science Academy for Wales for 12 months.”

“We had funding from Communities First which we haven’t had before but this was a one off.”

“[We have received] funding from The Co-op Community Fund and Tidy Towns.”

“[We have had] extra money from the Big Lottery.”

“We have just been successful in being awarded funding (Big Lottery, Advantage) to deliver a new service for 50+. We have however lost funding for a wellbeing centre and community advocate. (Both were time limited, and will not be renewed, they were funded by LHB).”

“[We] received a pledge of an annual grant of £6,500 from our denomination, United Reformed Church (Wales), which will help us to maintain the minister over this period.”

Voluntary income

Others have benefited from increased voluntary funding, after appealing to members and local communities.

"[We] appealed to members for financial support for [a] building project."

"[We fundraised through a] Tesco bag-pack and non-uniform day [at] community schools."

Earned income

Some organisations have been able to benefit from the current economic climate, as demand for their competitively-priced services and facilities have increased. Others commented that the need for more prudent financial management has led to increased efficiency and cost savings.

"We are finding more people are hiring the hall for their personal fund-raising events - we conclude this is due to funding becoming harder to obtain."

"Good levels of funding for consultancy work, where we charge public sector partners."

"Funding has improved after a systems review identified the need to provide more funding for preventative works."

One organisation commented that they have benefitted as a direct result of the recession, due to the services they provide, in alternative fuels. An increased number of private motorists are approaching the organisation as fuel prices increase, in order to purchase or learn about making bio-fuels.

"The demand for the fuel we sell has more than doubled in the last year. We are also working on several projects overseas."

"We are receiving more inquiries, and the membership is constantly growing. We are running more seminars and they are all fully booked in advance."

They are an organisation consisting of member groups that make fuel and power generators. Membership has increased, and members have also experienced increased demand for services.

"All our members who make fuel for sale have more orders than they can fulfil."

"Many of our members are now also running generators which can export electricity into the grid, and also provide heat. Generation is now a significant part of the turnover of most bio-power operations."

Some organisations have improved income by undertaking more work in order to earn income, but this is limiting their capacity to do grassroots work.

"We are having to take on more strategic research commissions that may well help keep the organisation alive, but which takes away our capacity to do grass roots work."

The financial situation over the next twelve months

Looking to the future, organisations grew in confidence again. A reduced 46 per cent of organisations in June 2011 (52 per cent in October 2010 and 48 per cent in January 2011) felt that the financial situation of their organisation would get worse; 41 per cent (39 per cent in January 2011) felt that it would not change and 13 per cent (also 13 per cent in June 2011) felt it would improve.

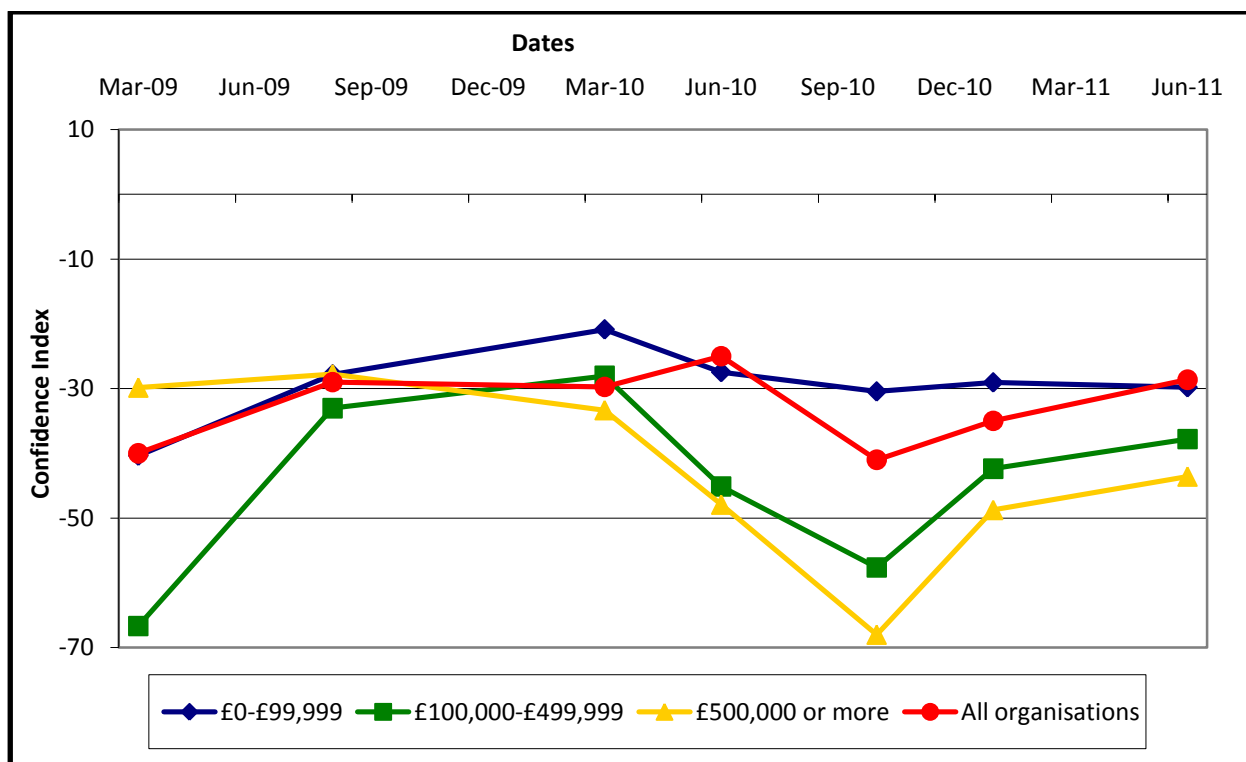
The confidence index for future financial performance increased by 2 points to reach -33 points overall in June 2011 (Table 6, Figure 6). There was a mixed report across the income bands. Organisations with incomes between £250,000-999,999 reported large increases in future confidence. Confidence in income bands £10,000-99,999 and £1,000,000 or more reported slight losses, and the rest remained stable.

Since March 2009, the confidence index improved from -40 to -25 in July 2010, falling back to -41 in October 2010 and has risen slightly to -35 in January 2011, and -33 points in June 2011. The dip seems to correspond to uncertainties in public funding by the new UK government in Westminster, and improvement with the announcement of the Welsh budget in November 2010, where the settlement was not as bad as feared.

Table 6: The Confidence Index of organisations in regards to their future financial situation over the next twelve months, by income band, March 2009, August 2009, March 2010, June 2010, October 2010, January 2011 and June 2011.

Income band	Confidence						
	Mar-09	Aug-09	Mar-10	Jun-10	Oct-10	Jan-11	Jun-11
1. Less than £10,000	-33	-22	-14	-19	-22	-31	-31
2. £10,000 - £99,999	-36	-27	-36	-37	-30	-26	-29
3. £100,000 - £249,999	-62	-44	-40	-52	-58	-36	-42
4. £250,000 - £499,999	-66	-54	-48	-37	-57	-53	-28
5. £500,000 - £999,999	-58	-54	-44	-50	-65	-48	-23
6. £1,000,000 or more	-17	-39	-32	-46	-69	-49	-56
All organisations	-40	-29	-30	-25	-41	-35	-33

Figure 6: The Confidence Index of organisations in regards to their future financial situation over the next twelve months by paired income bands, March 2009, August 2009, March 2010, June 2010, October 2010, January 2011 and June 2011.

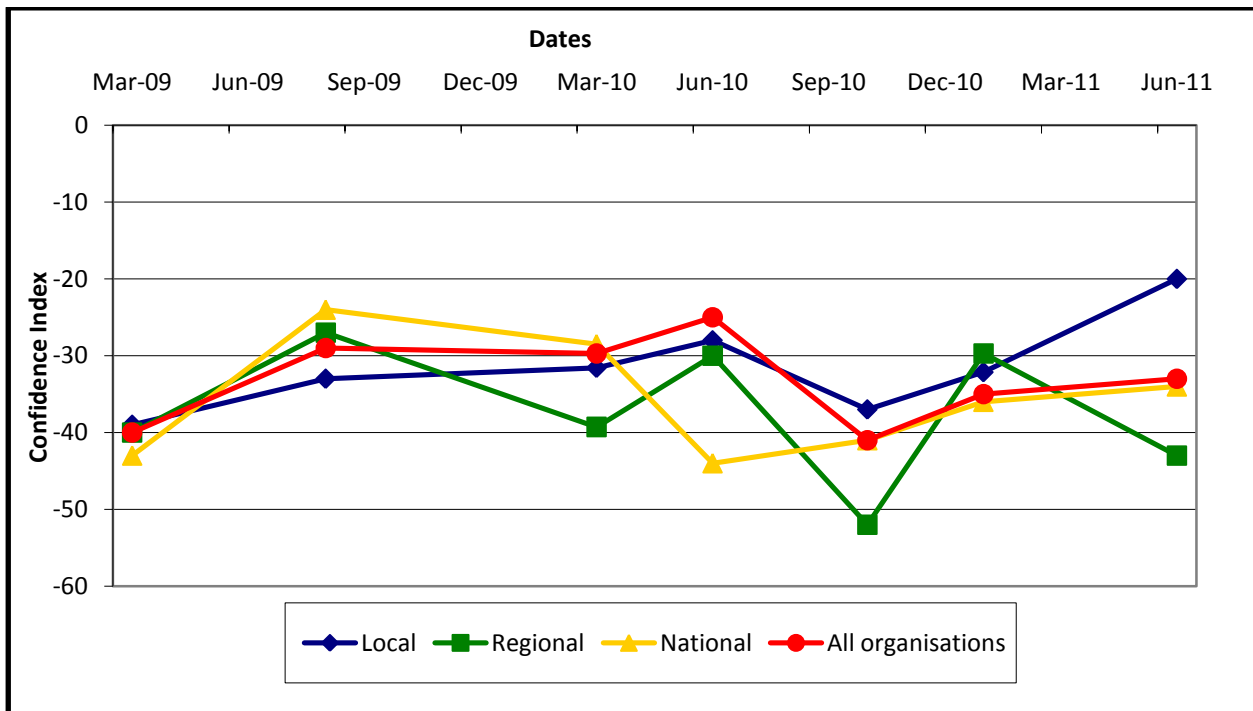


The confidence index for future financial performance over the next twelve months by organisation size shows that local organisations have gained 12 confidence points to reach -20, but regional organisations lost 13 points to -43 in June 2011. National organisations experienced a slight increase in confidence of 2 points to -34 and overall, confidence increased by 2 points to reach -33 points in June 2011.

Table 7: The Confidence Index of organisations in regards to their future financial situation over the next twelve months, by organisation coverage, March 2009, August 2009, March 2010, June 2010, October 2010, January 2011 and June 2011.

Area served	Confidence						
	Mar-09	Aug-09	Mar-10	Jun-10	Oct-10	Jan-11	Jun-11
Local	-39	-33	-32	-28	-37	-32	-20
Regional	-40	-27	-39	-30	-52	-30	-43
National	-43	-24	-28	-44	-41	-36	-34
All organisations	-40	-29	-30	-25	-41	-35	-33

Figure 7: The Confidence Index of organisations in regards to their future financial situation over the next twelve months by organisation coverage, March 2009, August 2009, March 2010, June 2010, October 2010, January 2011 and June 2011.



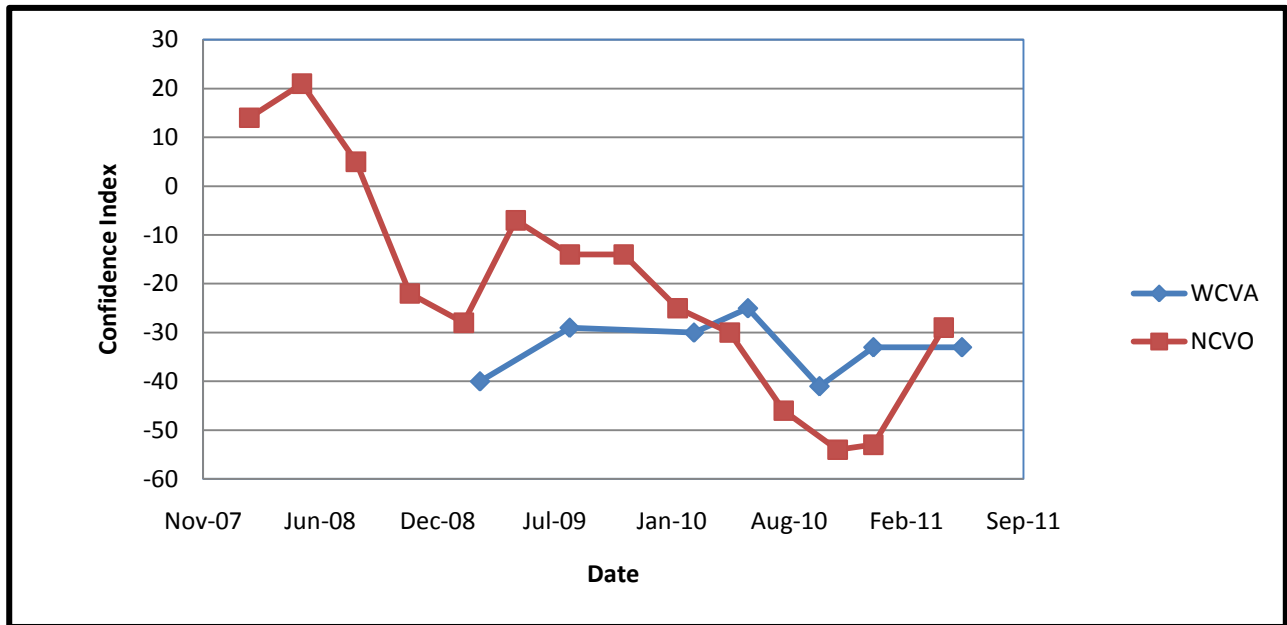
Comparison of NCVO and WCVA data from February 2008 to January 2011

The Confidence Index measured by NCVO started in February 2008, at +14 points. From May 2008 it steadily declined, to -53 points in January 2011, apart from a small increase in May 2009. The most recent survey in May 2011 shows another increase in confidence, to -29 points. The Confidence Index measured by WCVA began in March 2009, at which point it was lower than that of NCVO, at -40 points. It has been more stable than that of NVCO, fluctuating between -40 points and -25 points. The most recent survey shows a small increase in confidence. The most recent surveys by NCVO and WCVA in May and June respectively show a switch, as confidence measured by NCVO is again higher than that measured by WCVA, but only slightly.

Table 8: Confidence Index of the financial future over the next 12 months: A comparison of NCVO and WCVA data from February 2008 to January 2011.

	WCVA	NCVO
Feb-08		14
May-08		21
Aug-08		5
Nov-08		-22
Feb-09		-28
Mar-09	-40	
May-09		-7
Aug-09	-29	-14
Nov-09		-14
Feb-10		-25
Mar-10	-30	
May-10		-30
Jun-10	-25	
Aug-10		-46
Oct-10	-41	
Nov-10		-54
Jan-11	-33	-53
May-11		-29
June-11	-33	

Figure 8: Confidence Index of the financial future over the next 12 months: A comparison of NCVO and WCVA data from February 2008 to January 2011.



Future financial concerns of organisations

Contracts and funding

Comments from organisations regarding their financial future showed concern for a variety of reasons. The overall reduction in available funding is a worry to many groups, as more organisations apply for reduced 'pots of money'. One grant-making trust commented:

"We get more applications, up about 50% compared with [the] same period in previous years. Fund raisers are applying more widely, and often with no chance of success."

The pattern of uncertainty of funding continues to be a concern for the future for many organisations. As well as changes and cuts in statutory funding, they continue to experience late decision-making. In many cases funding will be coming to an end this financial year, and organisations have no idea where funding will come from afterwards. An emerging trend is one of tendering or retendering for core business. Increased bureaucracy is another concern, further complicating funding criteria and applications, and potentially increasing costs of administering funding for third sector organisations.

"[There is] uncertainty about funding after March 2012."

"Funding is decreasing and Service Level Agreements are going out to tender."

"Significant cuts to Legal Aid funding and indications from some local authorities that they are reducing grant levels. Also Welsh Government funding is being held at the same level for the third year."

"We are finding that grants for training will be no longer available and the funding streams are changing so it is more difficult to fit in with their remit to draw down funding."

"Costs continue to rise, including costs associated with regulatory and legislative requirements, whilst available funding continues to decrease."

"We will receive a cut of about ... two thirds in our core funding from the local authority at the end of March 2012 ... [Two] contracts ... may end over the next 12 months, coming to £90,000 in total. Lack of clarity about Communities First funding - we may lose two projects ... totalling about £100,000 in April 2012."

"There are cuts to our funding being implemented in various ways and we are currently being asked to work with Local Authorities and others on different (i.e. cheaper) models of service delivery. Some authorities are taking the retendering route in an effort to reduce costs of services, including inviting in large scale (often multinational) provider organisations."

With the new financial year, some organisations have found that the cuts have not been as bad as they expected. Others have been successful in being awarded funding, but an emerging trend is for funding to be short term, usually up to 12 months.

Health

The restructuring of the Health Service is impacting upon the third sector, as well as the need of the Local Health Boards to make cost savings. In an effort to maintain greater knowledge and control over spending of outsourced services, some Health Boards have in fact increased the cost of administering funding for third sector organisations. This is particularly worrying for small organisations with limited resources.

Another organisation had a contract with a Health Board from two years ago to provide counselling services, set up in response to perceived need from the previous Health Board. This was a successful service with positive feedback, which they hoped to continue and expand. Despite the Health Board planning to expand counselling services, this organisation is likely to lose out, as tendering will be for a regional provider.

“The current contract we have will not be continued after March 2012. I am not hopeful that we will be in a position to bid for this ... being a relatively small organisation we may well not have the capacity to pass the PQQ stage. My perception is that it is likely that this contract will go to a private company, or perhaps a national charity.”

Voluntary income

Organisations that rely on voluntary income and membership subscriptions are particularly concerned, as the recession has weakened many individuals' financial position. This has especially impacted on sports, leisure and arts groups, which may be considered 'luxury' items.

“We depend on voluntary contributions; we anticipate that some of our members' and attendees' financial situation will be adversely affected by government policy, so they will have less disposable income.”

“Membership will continue to fall due to the recession.”

“There is no sign that loss of members will abate.”

Earned income

Organisations that rely on earned income predict that they will continue to experience reduced income, but some respondents are more optimistic, especially those with income streams, which remain in demand or have seen an increase in demand as a result of the recession.

“Currently, we aren't reliant on any funding. We do see the popularity of the Bunkhouse increasing further. We suspect that more people are staying in the UK for their holidays.”

“We have developed a trading arm which we believe will be able to expand current activities.”

Costs

Rising utility costs are a general concern across all types and sizes of organisation, especially where they are experiencing a simultaneous stagnation or decline in income. The lack of inflationary increases to counter rising costs is an issue. Some organisations are already paying utility bills with reserves, which are now in a position of coming to an end.

“Costs have risen (the price of heating oil & electricity has become a constant drain on our funds)”

“Predicted increase in utility costs/fuel will affect overall budget.”

The simultaneous shrinking income and rising costs are leaving some organisations in a position of ‘ensuring survival’.

Strategic changes

Others are making strategic decisions in order to improve their future financial situation, but the effects of such measures are yet to be experienced:

“Through the employment of a business development manager, we are in the process of developing our self-sustainability, leading to an increase in revenue streams and the overall turnover of the organisation through the promotion of usage of our premises for events ranging from adult education classes to large-scale conferences.”

“We are taking positive means to improve club advertising and encourage more members to come to the club.”

Many organisations are finding that their reputation is becoming increasingly important, as well as relationship management with funders and service users. Resourcefulness is also playing an increasingly important role.

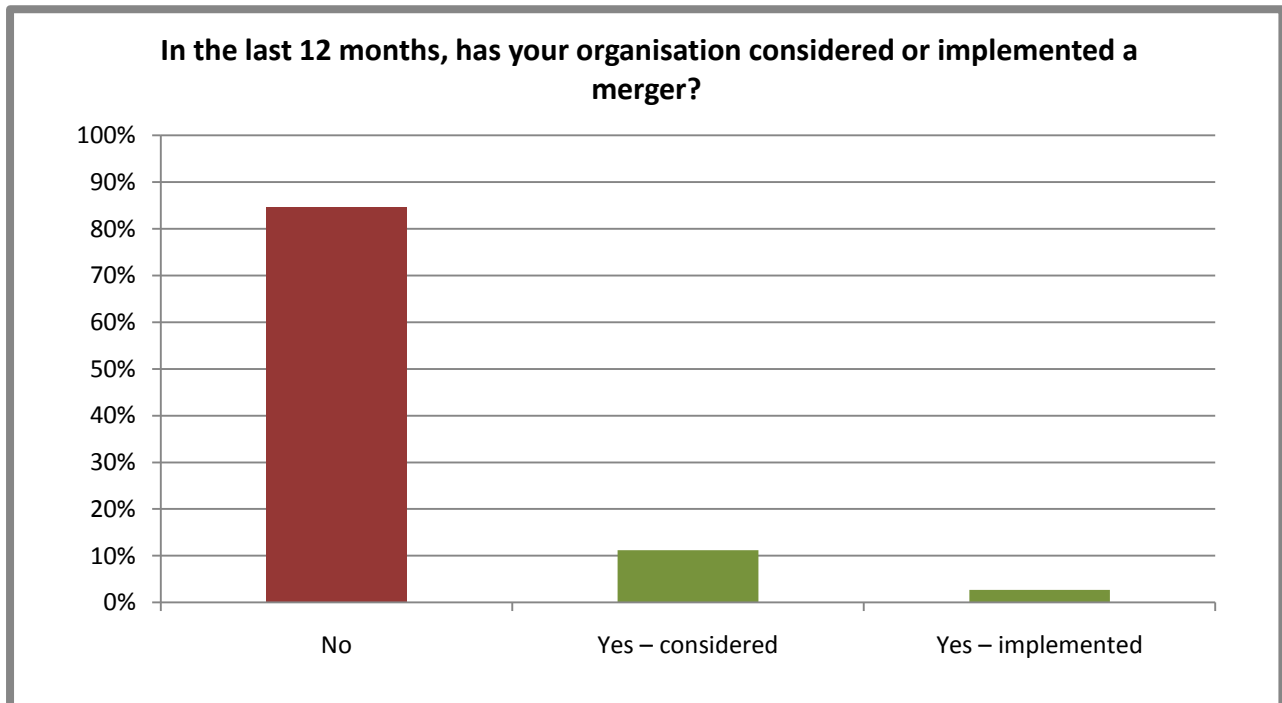
Mergers

In June 2011, research has found that of 482 responses, 3% of organisations have merged in the last 12 months, and 11% of them have considered merging. Of those that have merged, there appears to be a cross section of predominantly local family support organisations covering a range of ages. However, not all fit into this trend; there is one national organisation that supports young people into business, and another organisation that is a local sports leisure facility.

Table 9: Percentage of organisations that have considered or implemented a merger

	June 2011
No	85%
Yes - considered	11%
Yes - implemented	3%

Figure 9: Percentage of organisations that have considered or implemented a merger



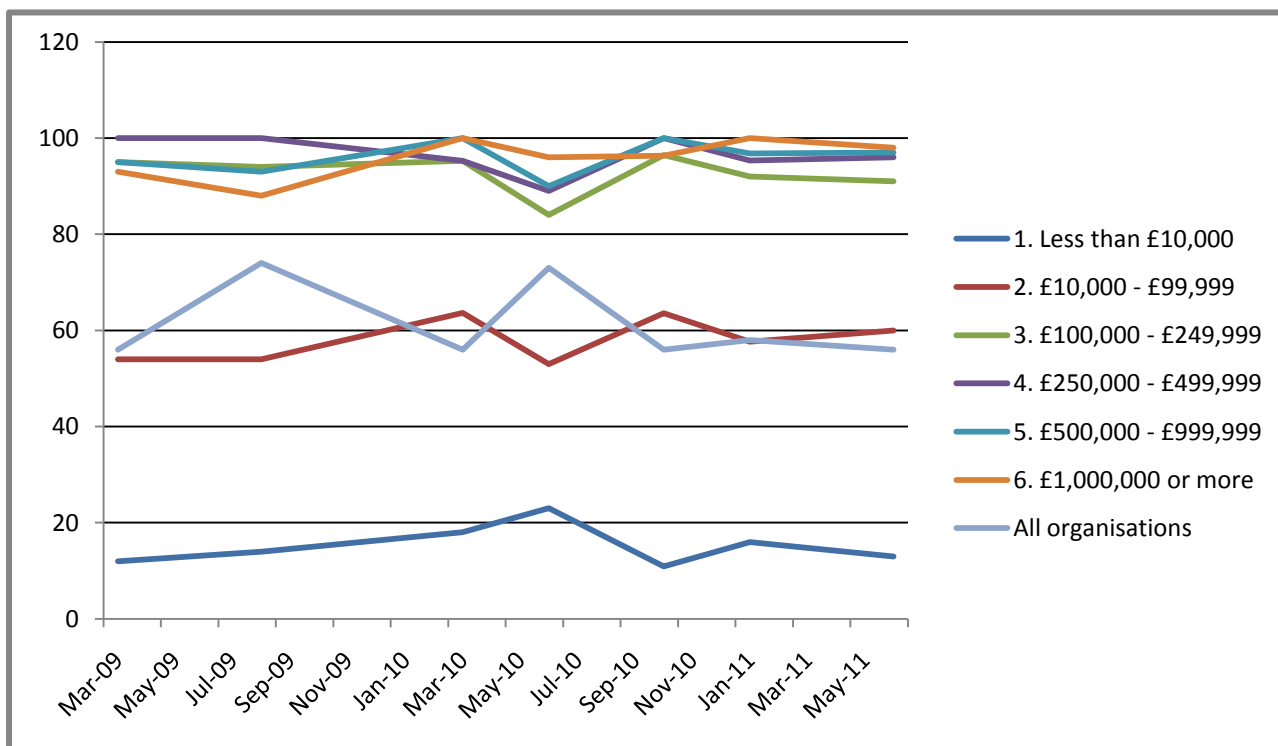
The effects on staffing

Of the 482 respondents, 270 (56 per cent) employed staff. The percentage of respondents which employ staff has maintained roughly level for the previous 3 surveys. Over the past 7 surveys, employment levels have remained steady on the whole, allowing for seasonal adjustment (employment typically increases in the summer months). The recession does not seem to have caused a dramatic reduction in levels of paid staff, underlining the reliance of most organisations on unpaid volunteers. The consistent levels of staffing across various income bands also shows that the surveys are not heavily influenced by changes in respondent profile.

Table 10: Staffing levels by income bands.

Income band	Per cent that employ staff						
	Mar-09	Aug-09	Mar-10	Jun-10	Oct-10	Jan-11	Jun-11
1. Less than £10,000	12	14	18	23	11	16	13
2. £10,000 - £99,999	54	54	64	53	64	58	60
3. £100,000 - £249,999	95	94	95	84	96	92	91
4. £250,000 - £499,999	100	100	95	89	100	95	96
5. £500,000 - £999,999	95	93	100	90	100	97	97
6. £1,000,000 or more	93	88	100	96	96	100	98
All organisations	56	74	56	73	56	58	56

Figure 10: Staffing levels by income bands.



Since the survey began in December 2008 a minimum of 726 posts have been reported to have been made redundant in Wales. The number of organisations reporting redundancies (50) and the quantity of redundancies in this survey (146) has increased considerably since the last survey, where 20 organisations reported 50 redundancies. This increase in redundancies was predicted in our last survey, where posts reported at risk increased from 295 in October 2010 to 471 in the January 2011 survey.

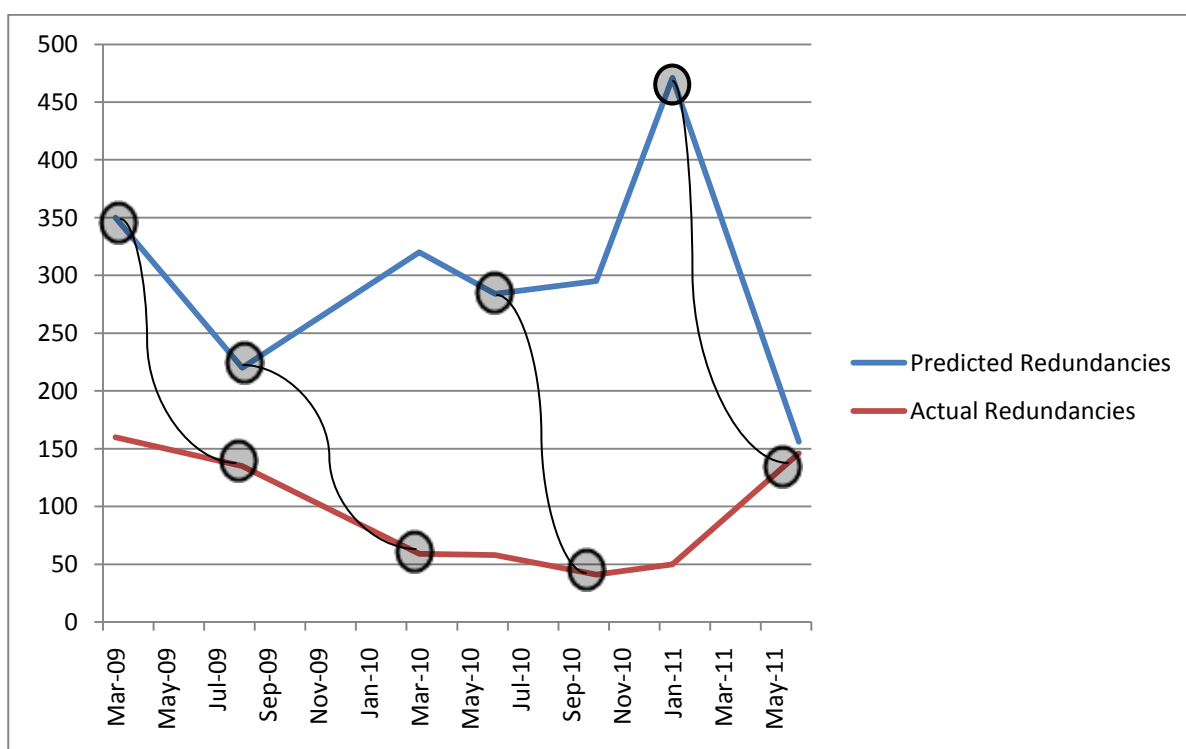
In this survey, a total of 69 organisations have reported 156 posts are at risk. This is a large decrease from January 2011, and hopefully means that fewer redundancies will be made in the near future.

Table 11: Number of predicted redundancies over the next 12 months, and actual redundancies made, from March 2009 to June 2011

	Mar-09	Aug-09	Mar-10	Jun-10	Oct-10	Jan-11	Jun-11
Predicted Redundancies	350	220	320	284	295	471	156
Actual Redundancies	160	135	59	58	41	50	146

From the figures returned by the surveys from March 2009 to June 2011, there is a clear link between predicted redundancies and actual redundancies. When predicted redundancies increased by 176 in January 2011, actual redundancies then trebled to 146 in June 2011. As predicted redundancies decreased by a third in August 2009, actual redundancies then decreased by over half to 76 in March 2010. In June 2011, predicted redundancies decreased from 471 in January 2011, to 156 now. Hopefully then, the next survey will return a positive result for the Welsh Third Sector on actual redundancies made.

Figure 11: Number of predicted redundancies over the next 12 months, and actual redundancies made, from March 2009 to June 2011



These figures represent the minimum level of redundancies or planned redundancies. There is no reliable way of estimating the total number of redundancies from the survey as the sample was not representative of the whole of the third sector in Wales, and it is likely that organisations which have staff and have made redundancies are more likely to reply to a 'state of the sector survey'. On the other hand, organisations which have closed down are not likely to have responded to our survey for obvious reasons. WCVA is also aware of other organisations which have made redundancies that have not been involved in these surveys.

There are no specific figures collected for redundancies in the third sector in Wales. However, the ONS reported that in the three months up to April 2011, 116,000 people had become redundant in the three months, down 27,000 from the three months up to January 2011 and down 56,000 from the same point 12 months earlier⁶. The redundancy rate in April 2011 was 4.6 per 1,000 employees, which is down 1.1 from the previous quarter.

Of the 46 organisations that have made people redundant, 18 (39 per cent) expect to be making further redundancies in the future. This is a decrease in the repeat redundancy rates from January 2011, when 60 per cent of organisations which had made people redundant expected to be making more people redundant within a year.

The impact on the organisation

Comments from organisations show that redundancies, or possible redundancies, continue to be a result of both loss of funding and reduced service use. Some organisations are making changes to their service delivery to make efficiency savings. Staff are working reduced hours to make savings and avoid redundancies, and some have not received pay rises in line with inflation, for several years. Volunteers are being relied on to carry out more tasks.

The new financial year has seen some organisations secure funding, meaning they are in a position to avoid redundancies or even take on staff. However, short term funding has led to a rise in short term and temporary contracts.

On the one hand, reduced staffing can make organisations more financially viable. However, the majority of respondents commented that redundancies have or will result in increased workloads for remaining staff. Organisations are expected to deliver the same services with fewer resources. Staff morale continues to suffer for these reasons, as well as uncertainty and late decision making. There is increasing frustration from the work that could be achieved.

"We are likely to be planning redundancies later this year - given funding reductions expected in 2012."

"Local Authorities slow making funding decisions this year. It will mean we may not have a presence in 5 out of the 22 counties."

"Staff have not had a pay increase for 2 years."

⁶ Labour market statistics, June 2011, ONS, accessed at <http://www.statistics.gov.uk/pdfdir/lmsuk0611.pdf>

“We are ... concerned how the trend will affect the independence and autonomy of the third sector as we seem to be drawn further into Local Authority and Local Service Board priorities and targets.”

“We have had 3 members of staff recently leave due to them coming to the end of 6 month Future Job Fund positions - it would be a positive step, in my opinion, to introduce a new scheme along the same lines, but offering a longer term (i.e. 12 months) placement to allow more time to bed into a role and receive sufficient training.”

“Fixed term contract not renewed because funding was not continued. We have cut staff hours. This is unlikely to avert redundancy in the future if the situation does not improve from March 2012.”

“Staff very frustrated at the work we could achieve and the difference we could make to families in a very vulnerable situation.”

“Trustees [are] nervous in case good staff leave for more secure jobs.”

“I am the only staff member. I avoid bankrupting the organisation which I love by not taking all my wages. I will continue to do so, but it is a strain on both me and [the organisation].”

“There is considerable uncertainty which results in low morale and staff possibly considering moving to alternative employment if it were to become available. This would have a negative impact on the project as we would lose experienced and committed staff that would take a wealth of knowledge with them.”

“Lack of continuation funding for good and proven projects.”

“We are not moving forward anymore, we are in a situation that is at a critical stage and without the support of grant funding to bring this final part of the project to fruition then we are going to go into serious decline.”

The impact on service users

Organisations that have implemented redundancies or have posts at risk commented on the actual or possible impacts on service users. In some cases, volunteers would be looked at to carry out more duties, as a way of reducing costs.

On the whole however, there continues to be concern about the impact of funding cuts and redundancies on the quality and coverage of services. Redundancies are resulting in over 50,000 hours of service being at risk in one regional organisation. Most respondents believe there will be a loss of capacity and key services, loss of expertise from organisations and the sector, and knock-on negative impacts on individuals and communities.

“Reduced staffing levels for financial reasons almost inevitably compromise the quality and effectiveness of support for service users and any changes to personnel, or support provider are disruptive and potentially traumatic for vulnerable service users.”

“We would have to restrict our opening times to the public.”

“[Redundancies would result in the end] of important and needed services and support to vulnerable people.”

“Loss of key services e.g. older peoples daycare putting people at risk and lowering their standard of living.”

“[Redundancies have resulted in the] closure of a wellbeing centre [and] reduction in hours available for advocacy service. Both were valuable and well used resources, particularly valued at this time of economic crisis.”

“Losing [the playground] has had a significant negative effect on the community... with local residents making comments at the children and young people losing out.”

“We would not be able to deliver the current level of service and our members would not have the support in place from any other organisation.”

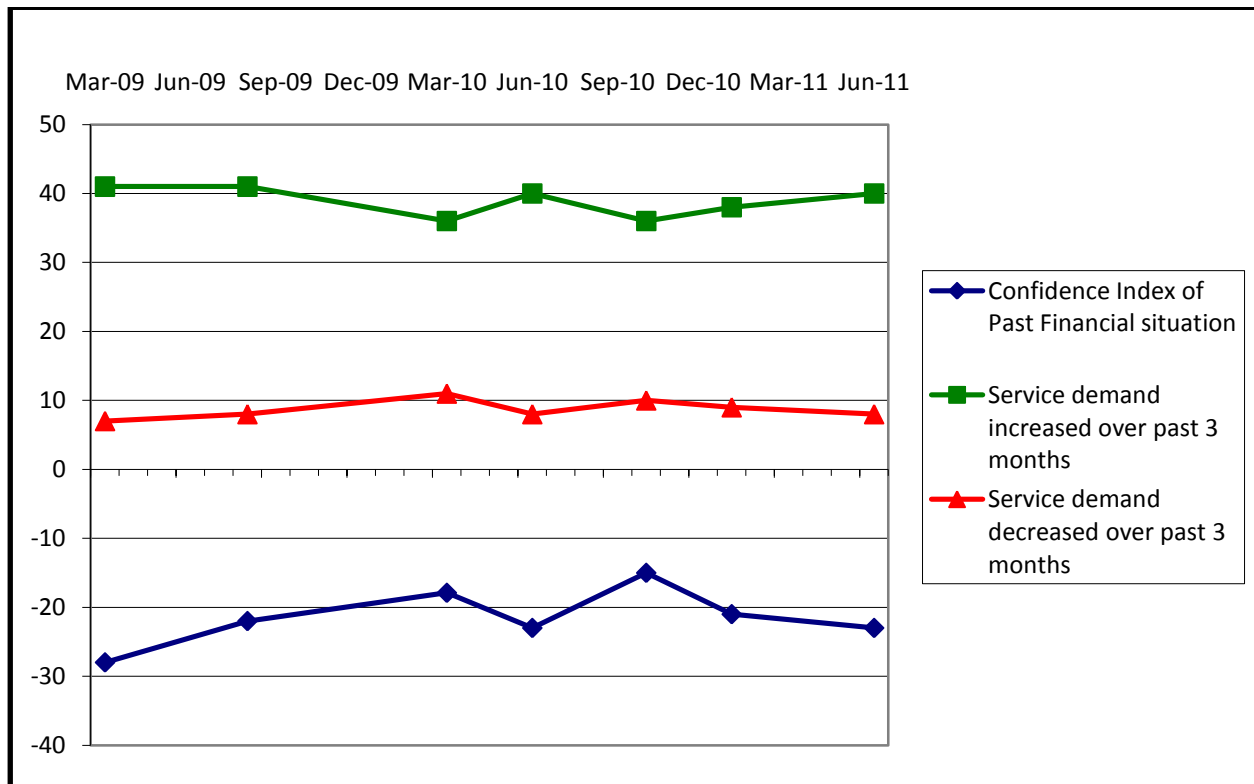
Current demand for services

Almost 70 per cent of organisations that responded said that they provided services, which is a lower percentage than given in the previous two surveys (75 per cent). Of those that provided services (338 respondents), 40 per cent indicated that demand for services had increased in the previous three months, whilst 8 per cent indicated that demand had declined. The majority reported no change (52 per cent).

Table 12: Demand for services from March 2009 to June 2011, with the Confidence Index of organisations in regards to their financial situation over the past three months.

	Mar -09	Aug -09	Mar -10	Jun-10	Oct -10	Jan -11	Jun-11
Confidence Index of Past Financial situation	-28	-22	-18	-23	-15	-21	-23
Service demand increased over past 3 months	41	41	36	40	36	38	40
Service demand decreased over past 3 months	7	8	11	8	10	9	8

Figure 12: Demand for services from March 2009 to June 2011, with the Confidence Index of organisations in regards to their financial situation over the past three months.



By comparing the Confidence Index of financial performance over the past 3 months with service demand over the past 3 months, it is possible to see a correlation. Confidence increases as more organisations report that service demand has decreased. Confidence also decreases as more organisations report that service demand has increased. It is clear therefore, that increased demand for services puts pressure on existing financial capacity to meet outputs, and that increased demand for services is not necessarily being met with increased income.

Looking to the coming year, 48 per cent predicted an increase in demand for services (similar to the 51 per cent in January 2011), whilst 6 per cent predicted a decrease (down from 7 per cent in January 2011). 45 per cent of respondents (down from 42 per cent in January 2011) predicted no change.

The outlook for services is mixed

The changing demand for services is generally linked to the type of service provided, which is a continuing trend. In some cases it can also be linked to geographical location, with regard to the decisions being made by Local Authorities:

"[We expect demand to] decrease in Swansea - due to staff shortages and funds to special needs."

Reduced demand

Organisations providing services that are considered luxuries continue to experience declining demand. Individuals have to forgo such activities due to reduced disposable income as a result of the recession. This includes arts, culture and sport and leisure organisations.

"I believe that members ... who have boats are scaling back, reducing the need for boat parking in our compound. We hope that as the financial situation improves, more people will return to sailing or take it up for the first time."

Children and family organisations such as parent and toddler groups are also being affected, with some groups having to close due to reduced use. A children's organisation commented on how changes in benefits will affect their services:

"We offer very affordable childcare, however many parents are in receipt of benefits, if they are cut then child care may become unaffordable."

Mixed

Organisations providing catering and conferencing facilities, such as village halls, have experienced a mixed result. This is a continuing trend: those that provide a locally competitive service have seen increased demand, while those that cater to the public sector and private companies may be at the receiving end of others trying to make savings. One group commented that they have been busy but are receiving fewer new bookings.

"As grant aid and funding in general decreases for other organisations, we believe we may find more people utilising the hall to organise their own fundraising events... as our hire charges are extremely competitive."

"[There have been decreases in] conferencing and training [and the] Coffee Shop. Public Services have made cuts to our funding and they are not using our services as much."

"[There has been a] downturn in clients hiring the rooms at the Centre, the cafe takings have taken a small drop ... and our buffet service has also seen a downturn in trade."

Increased demand

Advocacy and advisory groups

Advocacy and advisory organisations continue to experience an overall increase in demand for services, from people concerned about how they will be affected by cuts or changes in benefits and tax credits.

“As an advocacy provider, [we have received a] significant increase in requests for advice from families of disabled people concerned about cuts in services.”

“[There has been increased demand for] housing advice and debt advice services. Increased unemployment and debt problems will have an effect on people’s ability to pay housing costs or even to access a home.”

Community groups

Community organisations providing a variety of services commented on an overall increase in demand.

“More people are attending our provision including Mother and Toddler groups, Credit Unions, After School Clubs, Want to Work (Job Centre Plus with our building) and CAB Advice Surgeries.”

“With the way benefits have been cut and restructured I feel more people will be coming forward for support with employment/education/training and advice.”

One group stated that demand for family support services had increased, as a result of more families being in crisis.

“Single parents now have to work. We provide courses to put them on the right road. We expect stress and concerns over matters relating to poverty to put a strain on family life for most of our families.”

Credit unions

There is continuing interest in debt counselling and the services that credit unions provide, as more people struggle to make ends meet.

“People are becoming more aware of the services offered by Credit Unions. As the profile of the Credit Union is raised people will be aware they can save and borrow, we will also highlight the benefits of opening a Christmas savings account.”

Stretched resources

The increased demand is unfortunately stretching some organisations beyond their capacity to deliver services. This has resulted in having to turn people away, worry that potential service users are not being reached, and delivering some services outside their remit.

“We have more requests for help for access surveys, consultations, help in making complaints concerning discrimination. We now pretty well have to say "no" to everyone. Funds promised have not materialised so our work has been suspended,

with nobody else able to supply the same service that our specialised knowledge allows us to.”

“Although we try to respond to all areas that affect inclusive access we are really geared up to cover surveys of buildings and scrutiny of plans but because our area of expertise is disability equality we receive benefits enquiries and there are fewer other sources of information or support.”

In some instances they have also experienced cuts to funding, which have further intensified their situation.

“[Demand for all services has increased:] wellbeing centres, tenancy support, advocacy. Public sector have not renewed Service Level Agreements and threatened cuts to our funding.”

“[Demand has increased with] additional events bringing more people to the area. Lack of support from the officers in the public sector. The demand will increase but we will have problems making that happen as we do not have the manpower in place to make it happen.”

There is some concern that the public sector is setting up activities in direct competition with voluntary organisations and social enterprises that have invested time and money into developing their activities.

“We are told that local authorities threatened by cuts must now make a profit wherever they can and therefore they are collecting used cooking oil to sell to the waste oil market. This is putting local oil collecting companies out of work and is also wasting the economic opportunity to bring local wealth by raising the value of locally derived waste for sale as a valuable product.”

Involvement of volunteers

Overall, 91 per cent of the respondents indicated that they involved volunteers in their organisation. This does not include trustees or management committee members. 30 per cent of these organisations indicated that they had seen a change in volunteer numbers over the past three months, a slight increase from the last survey which reported 28 per cent. The responses were grouped, and indicated that 69 per cent of the 135 organisations that responded had seen an increase in interest, applications or actual volunteers. 31 per cent of responding organisations reported a decrease, or difficulty in recruiting volunteers. In January 2011, 76 per cent reported an increase, and 24 per cent reported a decrease in volunteering.

Table 13: Percentages of increases and decreases in volunteer numbers from all survey respondents (including those who had not reported a change in volunteer numbers), from August 2009 to June 2011.

%	Aug-09	Mar-10	Jun-10	Oct-10	Jan-11	Jun-11
Increase	26	22	20	21	21	28
Decrease	9	8	6	11	7	6

The percentages have remained fairly consistent throughout the surveys, but on this occasion there were approximately four times as many respondents who felt that volunteer involvement increased over the past 3 months, than those who felt that it decreased.

Table 13: Percentages of the predicted increases and decreases in volunteer numbers over the next 12 months from all survey respondents (including those who had not reported a change in volunteer numbers), from August 2009 to June 2011.

%	Aug-09	Mar-10	Jun-10	Oct-10	Jan-11	Jun-11
Increase	16	14	14	14	13	34
Decrease	19	16	16	18	15	4

The percentages have not fluctuated considerably throughout the surveys, but on this occasion, the number of respondents expecting an increase in volunteering has more than doubled. The number expecting a decrease has dropped, and a large gap between the two has emerged. This is a reversal of the previous trend, where a few more respondents expected volunteer involvement to decline rather than increase.

The trend of increasing volunteer involvement and enquiries is continuing, with many respondents continuing to attribute this to unemployment, redundancy, and a desire to gain work experience. Students and graduates are seeking experience to enhance their CVs, as well as people returning to work, such as stay-at-home parents. Volunteering may also be considered a method of maintaining a work ethic and motivation.

“[There has been a] big increase in volunteers seeking placement, particularly from graduates seeking internship or professionals who are working reduced hours ... people wanting their CVs to stand out from the crowd and looking for experience to add in.”

“We are getting more volunteers who are looking to use volunteering as a way to occupy time or keep up a work ethic as job opportunities may not be available to

them. As the current economic situation continues, I believe more people will look to volunteering as a viable option."

"Due to present climate individuals are starting to see volunteering as a way of showing potential employers they are prepared to go the extra mile."

Some also commented on how they might involve volunteers as a strategy to improve the organisation's capacity in future, in the face of increased demand and fewer resources.

"We will be seeking to extend some of our services through greater volunteer input."

"[We are] signing up people completing ILMs as volunteers. More people [are] coming forwards as volunteers anyway to gain new skills or keep active after being made redundant."

"We hope through working with CAVO, Aberystwyth University and others that we will become more well-known and attract more volunteers and if we secure funding for a post we will be able to offer much wider and more frequent opportunities to volunteers. We are also looking at ... opportunities which we haven't engaged with before."

Other organisations continue to experience reduced numbers of volunteers, as undertaking paid work is being prioritised. The reduced or static income of organisations has resulted in an inability to reimburse expenses, which has led to a loss of volunteers.

"We have attracted a few new volunteers but for how long we will be able to keep them is another matter. We do not have the funds to help us pay their expenses so we are limiting the amount of training they can take part in. All our volunteers are finding it hard to put in the same amount of time as they are limited to what they can spend from their own pockets."

"Fewer willing to commit and present becoming disheartened."

"We have lost volunteers - we cannot reimburse their expenses."

A reduced demand for services has resulted in some organisations reducing volunteer numbers. This could become a trend in organisations considered 'luxuries', such as sport and leisure, and arts organisations. One sports club stated:

"There are less children and teams to coach. Coaching course cancelled at Easter mainly I believe, due to the current economic climate."

Conclusions

The Welsh economy appears to be improving slightly with unemployment rates decreasing (though still higher than the UK rates) and employment increasing. Public sector budget cuts are happening, but appear to be less severe than in England. However, the future seems uncertain, as potential impacts of changes in the benefits system and anecdotal evidence from those working with people experiencing poverty sound a warning note. It is important at this time that the Third Sector is able to suggest solutions and work with government to alleviate the situation of vulnerable people and also to challenge government with evidence where policies are not working.

The seven surveys conducted since February 2009 provide evidence of the ongoing effects of the recession and subsequent recovery on the third sector in Wales. Whilst the data is not able to provide a comprehensive picture, there have been around 500 responses to recent surveys which are illustrative of the situations of many organisations in Wales.

The new financial year has seen some organisations in a marginally better position, as they have secured funding for the next 12 months. Some have also improved their situation by becoming more efficient. Some organisations have also experienced an increased income as a result of the recession, such as competitively-priced village halls and alternative energy providers.

This has translated into a slight increase in confidence within the sector since January 2011, but it is still very low (at -31), and 7 points lower than the same period in 2010. Confidence within the largest organisations is the lowest, and the greatest increase in confidence is within medium-sized organisations, from £250,000 to £999,999 income. When considering the area covered (local, regional or national), again there has been some increase in confidence, but overall it is worse than 12 months ago.

All sizes of organisation report a decreasing level of confidence for their financial situation in the past 3 months. The majority of respondents reported a continuing worsening situation, to a point of 'ensuring survival'. The main points of concern are the uncertainty, late decision making, and short-termism of decisions and funding. A small proportion of respondents have either considered or implemented mergers, which can be an effective way of making efficiency savings and submit joint funding applications. Considering their future financial position, generally organisations are more confident than 6 months ago, but it is approximately the same as 12 months ago.

It has also been possible, to compare the responses of Welsh organisations with those who respond to the Charity Forecast Survey carried out by NCVO. The methodologies are slightly different, so exact comparison is difficult. In January 2011 it appeared that organisations in Wales were more optimistic than their counterparts based in England. However, the most recent survey shows a marked improvement in the confidence of organisations in England whilst organisations in Wales appear to have similar levels of confidence (or pessimism). Reasons for this are not clear at the moment.

The number of actual redundancies is greater than recorded in any survey since March 2009, at 146 in the previous 6 months, although this is much lower than the 471 predicted in January. Comments reinforce the view that organisations are operating on 'skeleton staffing' in order to ensure the survival of the organisation. The number of predicted redundancies is the lowest yet, at 156. This could be the result of the allocation of funding

in the new financial year putting some organisations - and their staff - in a more secure position.

Demand for services continues to grow, with more organisations are reporting an increase in demand than those reporting a decrease. This largely comprises advice and advocacy organisations, for people affected by redundancy and benefit cuts. Organisations that deliver these services are often simultaneously experiencing funding cuts, meaning their capacity to deliver is stretched. Reduced demand for services is generally being experienced by arts, sports and leisure clubs, as they are being considered 'luxuries'.

Organisations that involve volunteers are generally reporting an increase in involvement, especially where such opportunities can enhance CVs and lead to paid employment. This is leading many organisations to improve volunteering strategies. However, it is important that the third and public sectors do not see volunteers as a free alternative to paid staff, as there are still costs involved in recruiting and training. Other organisations are struggling to retain volunteers, either because they cannot reimburse expenses, or because volunteers can no longer give their time as they are searching for paid employment. The reduction in volunteers is undermining the ability of organisations to deliver services and provide activities.

Despite the deteriorating situation of many groups, there will always be some success as there is always some funding available. Some organisations have been awarded funding and grants, and are in a position to take on staff and new projects.

In conclusion, many organisations continue to experience difficulties, reporting a loss of funding and contracts, trouble securing new funding, and increased demand for services. Few groups have the confidence that their situation will improve in the next 12 months. The third sector is being squeezed at both ends, suffering increasing costs and decreasing income. Not only are utility and fuel costs rising, but the costs of legislative and regulatory requirements are also increasing. More complicated funding and monitoring requirements are increasing costs of administering funds for third sector organisations.

Many feel that the sector is being treated poorly, and this is impacting upon relationships with the public sector. Small organisations feel that they are bearing the worst of it, losing out to larger organisations and struggling to cope with complicated funding applications.

There is widespread feeling of a lack of understanding and appreciation of what the sector does, and how much it does. Trust in the public sector is deteriorating rapidly, and many organisations fear some form of reprisal if they speak freely. Without addressing this, and making more effort to engage with and consult the sector (rather than hiding behind closed doors), statutory bodies are in danger of irreparably damaging relations, as well as losing smaller organisations, expertise, and capacity to deliver services.

Acknowledgements

This report was written by Bryan Collis, Roberta Roberts, James Shaw and Francesca Hughes. Detailed comments or questions should be directed to any of the authors at research@wcva.org.uk. Help with survey development and compilation of results was provided by WCVA colleagues. Helpful discussions with colleagues from our sister councils, NCVO, NICVA and SCVO are also acknowledged.

The authors thank those who have replied to the survey.

**B Collis
R Roberts
J Shaw
F Hughes
June 2011**

Appendix 1: Survey method and responses

The survey is carried out by contacting all organisations for which WCVA has an email contact and who have indicated that they are happy to receive communications from WCVA. The on line questionnaire has remained constant in question content for all four surveys. In July 2009 questions about volunteering were added and questions regarding suggested actions government or WCVA could undertake were removed. In July 2011, a question on mergers was added. There have been a number of organisations which have responded in more than one of the four surveys, allowing for some paired comparison of responses.

The response rate (8.3 per cent) is similar to other on line surveys, and has fallen slightly this quarter. A number of organisations request to be removed from the survey with each mailing, but not enough to cause concern at the moment.

As email contact details of all organisations are not available, a random sample of organisations is not produced. Also, the respondents are biased towards incorporated organisations and registered charities. Therefore the survey cannot be regarded as representative of the whole third sector in Wales.

Annual income	Number of responses			
	Jul-10	Sep-10	Jan-11	Jul-11
Less than £10,000	149	174	169	161
£10,000 - £99,999	126	151	151	161
£100,000 - £249,999	44	57	75	57
£250,000 - £499,999	38	28	43	25
£500,000 - £999,999	20	20	31	30
£1,000,000 or more	28	55	49	48
Not known	160	0	0	0
Total	565	485	518	482

Area of activity	Number of responses			
	Jul-10	Sep-10	Jan-11	Jul-11
Local	448	402	425	392
Regional	50	31	37	35
National	67	52	56	55
Grand Total	565	485	518	482

Area	Number of responses			
	Jul-10	Sep-10	Jan-11	Jul-11
Anglesey	13	11	5	9
Gwynedd	26	28	15	20
Conwy	20	12	7	20
Denbighshire	21	20	12	16
Flintshire	16	19	13	16
Wrexham	21	15	10	14
Powys	39	22	15	37
Ceredigion	30	35	11	21
Pembrokeshire	24	17	19	19
Carmarthenshire	38	30	22	32
Swansea	44	37	20	44
Neath Port Talbot	17	18	24	17
Rhondda Cynon Taff	41	32	23	30
Bridgend	25	17	16	24
Vale of Glamorgan	18	13	13	21
Cardiff	64	58	22	58
Merthyr Tydfil	7	12	12	9
Caerphilly	16	21	22	22
Blaenau Gwent	16	14	14	6
Torfaen	20	16	9	8
Monmouthshire	23	10	12	13
Newport	15	18	20	13
Address in Wales	554	475	518	469

Legal form	Number of responses			
	Jul-10	Sep-10	Jan-11	Jul-11
Registered charity	245	194	169	152
Company Limited by guarantee	141	103	74	69
Friendly society or Industrial and provident society	16	8	9	10
Cooperative	8	8	2	4
Unincorporated association	35	30	12	17
Informal group with no constitution	14	7	8	2
Registered for VAT	32	26	15	18

Appendix 2: The questionnaire

WCVA State of the sector Survey 7

May 2011

Since 2009, and in January 2011 WCVA conducted surveys into the effects of the recession on the third sector in Wales. If you haven't already received a copy of the reports, please ask and we will send them to you, or they are available on the WCVA website www.wcva.org.uk/research.

Whilst the recession officially ended in December 2009, the effects of the recession are continuing, both in terms of unemployment and business failures and in the tightening of public purse strings. In view of this threat to public expenditure, WCVA aims to continue to monitor the situation, to see if there are ongoing effects on the third sector. Therefore we are contacting you and asking some of the questions again.

If you responded to any of the surveys in 2009, 2010 or January 2011, please simply confirm your organisation and contact details below, and skip questions 1-4, starting at question 5.

If this is the first time you have responded to this questionnaire, please complete as many of the questions as you can.

Your responses will only be used for the purpose of producing a publicly available report which will be available in September 2011. The report will not identify your organisation.

Please add your contact details below

Name of Your Organisation:

Your reference number (on the email we sent you)

Address:

Line 1:

Line 2:

Line 3:

Line 4:

County:

Post Code:

Contact Person:

Email:

Telephone:

Have you have responded to this survey before? (please check the email we sent you)

Yes (*Go to question 5*)

No (*Go to question 1*)

About your organisation

1. My organisation is (please tick all that apply)

Registered charity

Company Limited by guarantee

Friendly society or Industrial and provident society

Cooperative

Unincorporated association

Informal group with no constitution

Registered for VAT

Other (please specify)

2. What are your organisation's main aims?

3. In which county/ies is your group active:

All Wales (*Go to question 5*)

One or more counties in Wales (*Go to question 4*)

4. Please tick all the counties that apply

Anglesey

Conwy

Flintshire

Powys

Pembrokeshire

Swansea

Bridgend

Gwynedd

Denbighshire

Wrexham

Ceredigion

Carmarthenshire

Neath, Port Talbot

Vale of Glamorgan

- | | |
|---|--|
| <input type="checkbox"/> Cardiff | <input type="checkbox"/> Rhondda, Cynon, Taf |
| <input type="checkbox"/> Merthyr Tydfil | <input type="checkbox"/> Caerphilly |
| <input type="checkbox"/> Blaenau Gwent | <input type="checkbox"/> Torfaen |
| <input type="checkbox"/> Monmouthshire | <input type="checkbox"/> Newport |

Your organisation and the current economic situation

5. All together, do you think the general situation of your organisation will improve or worsen over the next 12 months?

- Worsen No Change Improve

6. My organisation has an annual income of

- Less than £9,999
- £10,000 - £99,999
- £100,000 - £249,999
- £250,000 - £499,999
- £500,000 - £999,999
- £1,000,000 or more

7. In the last three months has your financial situation improved or worsened?

- Worsened No Change Improved

8. If it has changed, why? Please tell us about any sources of funding which have increased or reduced, or any grants or contracts which have stopped.

9. In the next 12 months, do you expect your financial situation to

- Worsen No Change Improve

10. If you think it will change, why? For example, is funding likely to decrease or grants to end, or have costs risen?

11. In the last three months has the recession affected the way people see your organisation, or how they engage with your organisation? Here we are thinking of different sorts of people including members, volunteers, service users, other groups, funders and members of the public.

- Yes No Don't know

12. If yes, which people in what way?

12a. In the last 12 months, has your organisation considered or implemented a merger?

Yes - considered Yes - implemented No Don't know

13. Do you involve volunteers?

Yes (*Go to question 14*) No (*Go to question 19*)

14. Have you seen any change in the number of volunteers in the last 3 months?

Yes No Don't know

15. If yes, how has it changed?

16. What, briefly, are the reasons for the change?

17. Do you think the number of volunteers will change in the next 12 months?

Yes No Don't know

18. If yes, in what way?

19. Do you employ staff?

Yes (*Go to question 20*) No (*Go to question 28*)

20. Have you made redundancies in the last 3 months?

Yes No Don't know

21. If yes, how many posts?

22. What, briefly, were the reasons for the redundancies?

23. Do you have posts currently under threat of redundancy?

Yes

No

Don't know

24. If yes, how many posts?

25. What, briefly, are the reasons for the threat of redundancy?

26. What are the actual or likely effects of any redundancies on your organisation, your members or your service users?

27. Are there any other staff issues raised by the recession?

28. Do you provide services?

Yes (*Go to question 29*)

No (*Go to question 33*)

29. In the last three months, has the demand for any of your services increased or decreased?

Decreased

No change

Increased

30. If it has changed, which services?

31. Has your delivery of services been affected by cuts in public expenditure

Yes

No

32. If Yes please describe the effects e.g. we have taken over public sector services, we have more demand for public sector services, we are working with the public sector to develop new models of service delivery, public sector have made cuts to our funding.

31. Looking forward to the next 12 months, do you expect demand for any of your services to increase or decrease?

Decrease

No change

Increase

32. If you expect it to change, which services and why?

33. Please use this space to tell us anything further regarding the ongoing effects of the economic downturn, public sector budget cuts and your organisation. This might include actual or potential cuts in your funding, late decisions in changes to funding or your experiences of dialogue when funding or agreements are altered.

34. WCVA would like to contact you in the future to monitor the effects of the recession on the third sector in Wales. May we contact you?

Yes

No

35. WCVA will be publishing a report based on this survey. Would you like to receive a copy of the main findings?

Yes

No

Thank you for completing this survey

Data Protection Act 1998. The above details will be held and processed by Wales Council for Voluntary Action (WCVA) on computer. The information will be used by WCVA for the monitoring and promotion of the voluntary sector in Wales. Information, apart from contact information, will not be passed onto a third party without permission.

The data may be considered as sensitive personal data where the above data and/or the organisation is involved with matters relating to race, ethnic origins, politics, religions or similar beliefs, physical or mental health or sexual life.

Please return this questionnaire to -

Freepost RRJH - GJZT - CSTA
WCVA
Morfa Hall
Bath Street
Rhyl
LL18 3EB

Appendix 3: List of organisations contributed to report

These are respondents to the survey that have given permission to use their comments in the report. We wish to thank the following organisations for their assistance:

1 st Swansea Valley Oak Scout Troop	Fishguard, Goodwick & Lower Town Civic Society
Abergavenny Tennis Club	Flintshire Mind
Aberjazz	Gibbs Trust
Abertawe Festival of Young Musicians	Green Phoenix
Aberystwyth University Guild of Students	Gwent Association of Voluntary Organisations (GAVO)
Able Radio	Gwent Theatre
Age Concern Gwent	Holywell Sewing and Knitting Group
Amelia Trust Farm	Home Start County Borough of Wrexham
Amman Valley Trotting Club	Horn Development Association Ltd
Arden Early Learning	In2Health
Arfon Access Group	Lampeter Quaker Meeting
ARTREGEN	Love and Care for Moldova
Association of Voluntary Organisations Wrexham (AVOW)	Maelor Voluntary Service
Bargoed YMCA	Maesteg Town Hall Ltd
Benefit Advice Shop	Maglona Club
Benenden Healthcare Society, North Wales & Cheshire Branch	Malltraeth Ymlaen Cyf
Bethesda Parent & Toddler Group	Mental Health Matters Wales
Bethlehem Church Life Centre	Mental Health Wellbeing and Volunteer Project
Bettws 1 st (Communities First Bettws Newport)	Monmouthshire GreenWeb
BikeAbility Wales	Montgomery Bowling & Tennis Club
Bio-power UK Ltd	Mynydd Isa Field for Youth
Breakthro Llanelli	Narberth & District Community & Sports Association
British Driving Society North East Wales	Neuadd Brofana
BVSNW	Neuadd Dyfi
Caia Park Partnership Ltd	Ogmore Valley Local History & Heritage Society
Cartrefi Cymru	Opportunity Housing Trust
Changing Faces Cymru	Over 50s Forum Flintshire
Church Army	Pant & Dowlais Boys and Girls Club
Clunderwen Senior Citizens' Association	Parish of Penarth, All Saints
Clybiau Plant Cymru Kids' Clubs	Pembrokeshire Yacht Club
Communities First - Briton Ferry West	Penarth & District Stroke Support Group
Community Justice Interventions Wales	Pensychnant Foundation
Cór Caerfyrddin	Physically Impaired People of Pembrokeshire Association
Cornelly United FC	Play Right Chwarae Iawn
Cornerstone Church Project	Ponthafren Association
Cross Hands Public Hall & Cinema	Porth United Reform Church
DASH	Powys Domestic Abuse Forum
David Hughes Community Centre	Powys Environment and Development Education Centre
Denbigh Youth Project	Prestatyn Offa's Dyke Path CIC
Denbighshire Home Start	Rhiwderin Community Centre
Down's Syndrome Association	Rhossili Village Hall
Duffryn Bike Club	Shelter Cymru
Dynamic, Centre for Children and Young People with Disabilities	Siawns Teg
Evans Public Hall	Skewen Cricket Club
Felin Fawr	Smart Money Credit Union
Fernhill Association of Residents and Fernhill & Glenboi Communities First	South Cefncaeau Family Centre

Swansea Care & Repair
TAN Dance Ltd
Taran Disability Forum
The Acorn Centre Voluntary Management
Committee
The Bridge Mentoring Plus Scheme
The Play and Leisure Opportunity Library
The Rhuddlan Environment Group
The Willows Centre
Theatr Fforwm Cymru
Tregynon Wind Farm Trust Fund
Treorchy Rugby Football Club
Wales Liberia Connect
West Glamorgan Cricket Coaches Association
West Wales Biodiversity Information Centre
White Rose Information & Resource Centre
Wrexham Access Group
Ynysir and Wattstown Communities First
Ysgol y Moelwyn