The art of the possible

Foundation for Social Improvement

Impact Report 2014/15
Our Values

Empathy
“Of all the courses on offer I would recommend the FSI training above competitors. The courses are the best structured to allow you to learn, engage with other participants, and develop ideas and action points relevant to your own needs whilst participating in group learning. The handbooks are a great reminder of learning points in the day when you need to recap on learning weeks or months later.”

Simi Ben Hur, Shaare Zedek

Excellence
“I came to the Trusts and Foundations course on Tuesday which was brilliant and, as I said on the day, possibly one of the best training days I’ve ever been to (and I used to work for Diageo and CocaCola so I’ve been on a few training courses!), and was then equally impressed by the Demonstrating Impact on Wednesday. Thank you.”

Natalie Trapmore, Fundraising for Grove Cottage

Respect
“Coming from a different sector and being new to charity I am blown away by the help and support your organisation gives. Thank you :-)”

Pete’s Dragons

Why do we do what we do?

We say:
“We train small charities and give them the tools and the confidence they need to diversify their income and make their organisations sustainable.”

“I would thoroughly recommend the FSI, their courses and support for small charities is absolutely invaluable. It has been instrumental in shaping our organisation and brought about great positive change. Thank You!”

Bryony Spooner, Deki
Persistence
“A lot of quality input in the day, good balance between information and inspiration to go away and to find out more.”

Stuart Barner, The Sycamore Project

Sense of the possible
“I just wanted to drop a little note to say thank you to the FSI for the excellent Major Donor session the other week. Not only did I enjoy the day but it was really useful and worthwhile. I’m looking forward to putting what I learnt into practice and hopefully bring in some big gifts for the charity.”

Sayara Muthuveloe, The Urology Foundation

Energy
“Well done on organising an interesting, informative and inspiring event! I am leaving the event bursting with new ideas.”

Melissa Miller, The Kindu Trust

They say:
“I’ve recently attended the FSI one-day course in Developing Corporate Relationships and would like to say how worthwhile I found it. I have attended a couple of these in the past run by other organisations and have found this one to be the one from which I have gained the most. I tried to think why this was and realised that, like other courses offered by the FSI, it was delivered by a tutor who had relevant, recent experience in the subject who brought personal examples to the table when explaining a concept, rather than just relying on theory. I also found easy access to the tutor during breaks for a spot of informal ‘mentoring’ to be particularly helpful. I have already begun to put some of the ideas shared into practice, successfully. I would not have any hesitation in recommending the FSI to anyone looking for effective and engaging training or mentoring, delivered in a practical manner”.

Jeremy Mitchell, Petersfield Museum and Flora Twort Gallery
“Thank you very much for having the London training events and giving us, small charities, access to such brilliantly led sessions. Both my colleague and I have found the courses very suitable and invaluable to a small charity like ours. This is the first time either of us have attended courses which had small charities in mind when the presenter was presenting the sessions!”

Susie Alemayehu, Host UK

Foreword from one of our Members

I can’t express how much I’ve learned since attending that first session with you, Pauline. Less than a month ago when I felt completely overwhelmed by the challenges of being Chair, undertaking something so new as a Strategy Review and all that is involved in terms of leadership, confidence, authority, initiative, and taking full responsibility - what a learning curve!

Today brought all that together in our session with you - I learned far more than what questions to ask - doing it with

Welcome from Emma and Pauline

2014/15 proved to be a difficult year for all small charities which only made our commitment to supporting our members even greater.

We are both inspired by the dedication and commitment of those working in the Small Charity Sector whether as staff members, trustees or volunteers, each and every person we have met, in sometimes the most difficult of circumstances, has shown a determination and strength of spirit that is truly awesome.

All this at a time when many of the small charities delivering direct services are stretched because of the increased demand (37%) for their support as shown in the Small Charity Index during the 24 months June 2013 to May 2015. We believe now, more than ever before, the FSI must support small charities to develop the crucial skills needed to govern and manage a small charity to provide sustainable provision of vital services.

We are also determined to work as hard as possible on behalf of our members to ensure that their voices are heard amidst the clammer and noise of larger charities with huge budgets for influencing, lobbying and campaigning. The FSI, through our research into the issues facing small charities must develop relationships and opportunities that allow your voices to be heard.

We are committed to representing you in as many forums as possible to meet this commitment, but we are also
my young colleague and deciding to use an online format moved me out of my comfort zone in a very useful way. You were also really affirmative of our progress as well as keeping us focussed on the task ahead.

None of this could have happened without the FSI and the forum it offered for training and advice. It is very special and it’s hard to identify exactly how profound its impact has been on both myself and the two trustees I attended with - it’s provided just the right guidance, inspiration, support and space we needed to move on.

Thanks so much."

Geraldine Omahoney, Kidtrust Varanasi

committed that it will be your voices, your opinions, your concerns and your issues that are heard. Our aim is to amplify your voice, not merely speak on your behalf.

As we write this Welcome (January 2016) we have 4,269 members, each and everyone of whom are striving to solve some of the most difficult and complex social, economical and environmental challenges facing society today. In a world where its citizens no longer look to governments to solve the problems they face, more and more are turning to charities and NGO’s across the globe for support. We are proud that the FSI can play a small part in shaping the world, through the support we provide, free of charge to our members.

As always our promise to you is that we will never cease to believe in our vision of endless possibilities to support you to overcome the challenges you face each and every day.

We hope that the year ahead enables you to support even more children, families and communities whether here at home or in places across the globe, we hope that those working to create a healthier and more sustainable planet for us and the generations that come after us to live on are successful in their endeavours, we hope that those campaigning and lobbying to influence and change policy make their voices heard and that they are listened to. Why? Because we know that only by working together, by supporting each other can we hope to find a solution to the social, economic and environmental challenges facing our world and its citizens.

Whatever your cause we know that we will be astounded by your creativity, passion and determination and we look forward to continuing the journey with you to build a better and more just world for all.

Emma and Pauline
Founding Chairman and CEO of the FSI

FSI Small Charity Members as at January 2016
Our Impact

"Tell me and I may forget, teach me and I may remember, involve me and I will learn"

Benjamin Franklin

There are a great many training courses on offer across the charity sector as a whole but so many are out of reach of small charities not only because they are expensive but also because they are only delivered in London.

The FSI has developed a core Learning and Development Programme that is often the only high quality training that many of the smaller charities in the UK can afford and, as importantly, can easily access. Without access to the courses on offer many small charities would struggle to not only develop the skills of their staff but would not have the ability to widen their fundraising horizons. They would not have the support they need to look at new ways to raise and earn income, to network with each other and share experiences and if possible, come together to work co-operatively in partnership with each other.

During a year in which the governance of charities has been under the spotlight we recognised the need for topics suitable for trustees and so we increased the richness of our suite of training topics by adding half day sessions specifically focused on developing the governance skills of small charity trustees. These have proved to be popular. However, there are still many trustees who, for various reasons, are not able to access training during working hours. We must over the next 12 months seek more flexible ways to support trustees as they strive to govern small charities that are stretched to the limit and who are often the last line of support for those in the most need. Governance in the Charity Sector as a whole has never been more complex and has never been more challenging.
What we do

Training
We deliver free training to thousands of delegates at our National Training events in London and in eight major cities around the UK throughout the year. We cover a range of core fundraising and governance topics based around the skills our members tells us they need to build the most.

Affiliates
We offer selected charities the chance to become our Affiliates for a year of intensive support, including pro bono consultancy. This involves a complete assessment of their organisation which helps us develop a bespoke and informed development plan.

Advice Clinics
One-to-one advice clinics with our team of experts run monthly throughout the year, giving our members the chance to receive tailored advice on issues they feel they need support with the most, free of charge.

Skills Conference
Our Skills Conference provides delegates free access to expert speakers on a range of back office skills to help run their charities as effectively as possible.

Fundraising Conference
Our Fundraising Conference brings together small charities to access learning from experts in a range of fundraising fields.

So what did we do?

Training
We trained 1960 small charity delegates at our three National Training events and seven Regional Training events.

Affiliates
The Guardian Award winners were announced in December 2014 and we were pleased to work with the 5 winning charities (A&M Training, Back Up Trust, National Ugly Mugs, SkyBadger and the Personal Support Unit.)

We said we would

Training
In 2014/15, in order to meet the increased demand for our services and facilitate more small charity delegates being able to access our services we would:
  • Increasing the number of places on training programmes on offer.
  • Expand the range of topics available to our members.
  • We will also review our geographical cover to ensure our training programmes are accessible to all of our members.

Affiliates
We will support up to five charities who have secured their places on this programme through the Guardian Charity Awards scheme.

Advice Clinics
This service has always been popular with our members and we will continue to offer this service over the coming 12 months.

Skills Conference
Building on the success of the Skills Conferences over the past five years we have taken the decision to increase the capacity of this event to more than 160. The impact of this is that we will deliver the conference over one day at a larger venue. We want to take this opportunity to thank Legal & General for their commitment to this conference over the previous five years.

Fundraising Conference
This is one of the most popular events in our calendar and we are committed to delivering over 200 delegate places to learn from the very best and most innovative talent in the charity sector.
Impact and highlights

Training
It is clear that our training courses are essential to helping small charities’ sustainability. As a result of the training, 100% of delegates said that the courses would help them do their job better, 75% reported the training had increased their skills, 90% said it had increased their knowledge and 90% stated an increase in confidence.

“Very inspirational session - as well as learning practical skills to apply, it is so encouraging to hear from someone with such amazing experience and see what an exciting career you can make in fundraising.”

Holly Smith, African Revival

Affiliates
Over the year, we have provided over £9,000 of pro bono consultancy to our Affiliate charities including support on developing fundraising strategies, reviewing impact measurement systems and strengthening governance.

“We keep dipping into your report as we develop our monitoring and evaluation. The Litigant in Person Support strategy has come on in leaps and bounds.”

Nick Gallagher, PSU

Advice Clinics
Our members repeatedly tell us this is one of the most valuable services we offer. 100% of our attendees said that our expert advisors answered their questions and have helped them do their job better.

“I am so delighted and extremely happy to be given this valuable advice by Pauline, I just wish I’ve known about this a few years before - but I can straight away be able to do some action from now.”

Linda Manlises, Sikat

Skills Conference
94% of the attendees reported an increase in skills as a result of attending the workshop sessions.

“Excellent range of topics which are invaluable to small organisations, but couldn’t find the time to start researching themselves.”

Kate Newton, CVS St Albans

Fundraising Conference
Following the conference, 99% of delegates reported an increase in their fundraising knowledge and 98% increase in fundraising confidence, while 97% rated the content as either “good” or “excellent”.

“Best fundraising conference in ages. Inspired, informed, equipped and overwhelmed in equal measure.”

The Sycamore Project

The Future

Training
In 2015/16 we will offer a series of half day courses targeted at Trustees. We will develop a minimum of two half day Master Classes one in ‘Making the Major Donor Ask’ and the second in ‘Developing Strategic Corporate Relationships’. We will expand our suite of learning topics to include a full day course on Direct Donor Marketing. We will also introduce online ‘refresher’ courses.

Affiliates
We will continue to support up to five charities through the Guardian Awards scheme.

Advice Clinics
We will continue to offer advice through our Monthly Advice Clinics, however in 2015/16 we will proactively market this opportunity to ensure that all of our members are fully aware of the service.

Skills Conference
The Skills Conference is one of our most popular events and is one of only a few opportunities where we are able to offer workshop learning in a series of topics that cover ‘back office’ support services. Our aim in 2015/16 is to secure a venue that will facilitate up to 180 delegate places over a one day conference. Ultimately we would like to mirror this conference outside of London.

Fundraising Conference
The Fundraising Conference will take place in 2016 during Small Charity Week. Our aim is to make up to 200 delegate places available to small charities. Again our ultimate aim will be to mirror the Fundraising Conference outside of London in 2017/18.
Advocating on behalf of the Small Charity Sector

What we do

Small Charity Index
The Index is a quarterly survey of our members, resulting in a quarterly evidence based “pulse of the sector” report, highlighting key issues facing small charities in the areas of Workforce, Governance, Financial Stability and Service Delivery. The Small Charity Index is the only small charity focussed report using a consistent data set, tracking trends as they arise.

Research
Each year we undertake a research project to give us a better understanding of small charities and this helps feed into the development and enhancement of our services for our members and our ability to influence.

Federation for Small Charities Council
The Council is a membership organisation who represent the sector by turnover, cause type and region, meeting four times a year to discuss key issues facing the sector.

Influencing in Whitehall
We aim to inform and influence new policies and opportunities that will affect the small charity sector through regular consultation with small charities and coordinating responses to Government Bills and consultations on their behalf.
We said we would

Small Charity Index
The Small Charity Index has become one of the crucial evidence-based platforms for the voice of small charities. We will continue to use this tool to deliver a clear picture to those who can influence change.

Research
The focus of our research during 2014/15 will be to determine to what extent the Small Charity Sector believes their independence is valued by the State.

Federation for Small Charities Council
We will continue to support the Council in their work to represent and raise awareness of the challenges facing small charities.

Influencing in Whitehall
We will continue to collect and accurately represent the views of small charities to various Government consultations. We will use events run by the FSI to engage with influencers across the sector.

What did we do?

Small Charity Index
We continued to collect quarterly data from our small charity members and in 2015 we launched “Small Charity Index Trends: Shifting Sands in the Small Charity Sector” which analysed 18 months of data. The main challenges facing small charities focused primarily on the substantial increase in demand for services. This increase has come at a time when income is flatlining and therefore funds are not available to increase staff numbers which has resulted in significantly heavy workloads for staff working in small charities. The trend in declining reserves held by small charities continued and will result in serious problems for a minority of charities in 2016.

Research
We were unable to undertake two big research projects this year and therefore we focussed our efforts in publishing the fourth edition of our biennial Small Charity Sector Skills Survey which concluded that skills gaps still present a major barrier for small charities across the UK. Fundraising remains the most challenging vacancy to fill with salary remaining the biggest reason why charities found it difficult to recruit. Key areas that needed significant skills development were fundraising (major donor, online and corporate), lobbying, utilising social media, structuring communications and the latest HR laws and practices.

Federation for Small Charities Council
We facilitated the Council to meet three times this year to strengthen the voice of small charities in the public arena. However towards the end of 2014/15 the group concluded that the structure was not working and all agreed that we should consider developing a more flexible programme focusing on building a network of Small Charity Ambassadors.

Influencing in Whitehall
We were invited to give evidence to the Parliamentary Committee reviewing the changes to the Protection of Charities Bill and to specifically cover the areas of how the changes in the Bill would affect small charities. We were invited by the Cabinet Office to attend a meeting looking at the charity sector as a whole to give our views on how best the Cabinet Office could support small charities. We were also invited by the Charity Commission to review their guidance to Trustees (The Essential Trustee). During the year we also sat on the Gift Aid Advisory Group to HMRC and hosted a round table event where over 100 small charities were able to put key questions to Rob Wills MP, the incoming Minister for Civil Society.
Impacts and highlights

Small Charity Index

In June 2015 we released the “Small Charity Index Trends: Shifting Sands in the Small Charity Sector,” using data that spanned 18 months from June 2014 to December 2015. We reported on how small charities have been coping:

- **Demand for Services:** We reported an increase in demand of 31% reflecting that many people are now turning to charities to support them in difficult times.
- **Workforce:** We found that staff levels remained consistent resulting in heavy workloads, however over the same period small charities saw an increase of 14% in the number of volunteers.
- **Financial Stability:** Voluntary income remained stable, earned income increased but the picture in respect of statutory funding remains a challenge, with statutory funding decreasing over the 18 months under review. A worrying factor remains that many smaller charities do not hold reserves, and charities that do hold reserves are reporting that they are decreasing as they are used to meet increased demand for services.

Research

Our biennial Skills Survey provides a platform to stimulate the debate on how we can support charities to become more effective and self-sustaining to allow their doors to remain open to the millions who need their support. We were able to use this research in conversations with the Cabinet Office on the subject of training support for small charities. We were delighted when the Small Charities Fundraising Training Programme was announced by the Minister for Civil Society and we felt that we had played our part in ensuring the programme was focused around the key areas of fundraising as identified in the Skills Survey.

Influencing in Whitehall

Being asked to give evidence to the Parliamentary Committee reviewing the changes to the Protection of Charities Bill and to specifically cover the areas of how the changes in the Bill would affect small charities was a significant highlight. We surveyed all of our members to gather their thoughts and opinions and made sure that we reflected these through our evidence.

A further highlight was influencing the Charity and Volunteering All Party Parliamentary Group to commit to one meeting each year that would focus on the issues of small charities. During 2014/15 the APPG left Westminster and headed for Manchester. With representatives from over 60 small charities attending it was exciting to be on the panel answering questions on the issues facing small charities and taking the views of small charity representatives in the room.

We also hosted a roundtable event in February where the Minister for Civil Society, Rob Wilson MP took questions from almost 100 small charity delegates. It is at events like these that small charity representatives can influence thinking directly with those in decision making positions.

The training I have received has been invaluable to NUM, we have completely changed the way we work with our donors, from point of contact to maintaining the relationship. We have also just signed up with eTapestry, due to our C.E.O having a chat with them at the training, which for me will really change the way I work, and hopefully have a positive impact on our donations.

Nicola Kenzitt, National Ugly Mugs
The Future

Small Charity Index
We will continue to collect this data and use it, in as many ways as possible, to influence stakeholders to mobilise and support small charities. Specifically we will publish and distribute as widely as possible, quarterly ‘State of the Small Charity Sector’ reports and use them in conversations with Government, Local Authorities, the media and with our partners.

Research
It is our aim in 2015/16 to carry out research in respect of collaborative working across the Small Charity Sector. Encouraging charities with similar aims and ethos to combine together in the interests of their beneficiaries or communities should be both logical and offer opportunities to deliver services that are both creative and innovative.

However, evidence from the Small Charity Index tells us that small charities are not collaborating nearly as much as they could. We believe that collaboration should be a long-term strategy which, if done well, will create real value and difference for those who are collaborating.

This is why we will undertake research which will underpin a campaign to be delivered in 2016/17 that will encourage more small charities to collaborate.

Influencing in Whitehall
We will continue to use every opportunity at our disposal to accurately represent the opinions of small charities in whatever forums we are invited to attend. Our aim as always will be to build awareness of the amazing work undertaken by small charities across the UK who represent 97% of the charity sector as a whole, but whose voices are seldom heard collectively at a national level.
Since its inception in 2010, Small Charity Week has raised the profile of the small charity sector and has celebrated the work of small charities. It has become one of the largest events on the FSI’s calendar; spotlighting the invaluable impact small charities have on individuals, communities and causes across the UK and around the world.

I ♥ Small Charities Day

Small Charity Week kicked off with a day to raise awareness of the work of small charities across the UK. Over 650 messages of support for small charities were pledged on I Love Small Charities Day, with #ILoveSmallCharities trending twice on Twitter and a social reach of over 511,000.

Big Advice Day

Small charities were given free expert advice from third sector and business leaders on topics they needed support with the most. We topped 2014’s 203 hours of free advice by giving away 276 hours to 102 small charities from an amazing line up of more than 50 expert advisors. We hosted 1:1 sessions alongside short workshops throughout the day and received overwhelmingly positive feedback:

- 100% stated the advice given helped them and their organisation to do their job better.
- 99% reported an increase in their confidence.
- 98% of participants had their questions answered.
- 97% of participants rated the overall event as good or excellent.

“Brilliant advisor with a wealth of knowledge ... Even offered and have agreed to set up a mentoring and support relationship!”

Katherine Hannah, Brain & Spine Foundation

Other activities on the day included:

- Training for Trustees and in fundraising from the Big Lottery Fund hosted by Bournemouth CVS
- A social media surgery and drop in hosted by Dudley CVS
- IOF North West held a Big Advice Day drop in on fundraising topics
- Accounting seminars were held in Newtown, Shrewsbury and Wrexham by Whittingham Riddell Accountants

Other events were held by Plymouth Octopus Project, Voluntary Action Arun & Chichester, Voluntary Action Waltham Forest and York CVS
Policy Day

On Policy Day, small charities were given the opportunity to meet and engage with policy makers to discuss issues affecting them and contribute meaningfully to policy debates. We launched two pieces of research: “Small Charity Index Trends: Shifting Sands in the Small Charity Sector” and “Small Charity Sector Skills Survey”.

The day ended with a Policy Day Reception hosted by the Minister for Civil Society Rob Wilson MP in the prestigious Admiralty House, which provided the opportunity for 65 small charities to meet with policy makers and mix with MPs including the Minister for Education Nicky Morgan MP.

Local Authorities across the UK also joined in and events were hosted in Richmond, Hertfordshire, Kent, Leeds, Worcestershire and Hull.

Volunteering Day

This day is a chance for small charities to promote their volunteering opportunities, as well as engaging with a range of events and initiatives to assist small charities find or support volunteers. 298 charities took part in six different volunteer events throughout the country.

Fundraising Day

As part of Fundraising Day, small charities were given the chance to raise funds and promote their fundraising initiatives. An enormous £41,413.62 was raised for small charities from the 15 initiatives that took place during the week which included:

- The Small Charity Week eBay Auction
- The Great Big Small Charity Week Fundraising Quiz
- eBay’s Give@Checkout competition
- The Sitting-down Decathlon
- A competition to win a place at the Virgin Money Giving London Marathon
- A competition to win a three-day pass to the IoF’s National Convention
- A competition offering a year’s free subscription to Remember A Charity

Celebration Day

Small Charity Week closed with Celebration Day, a day to recognise and celebrate the essential work and impact of small charities everywhere. The day was busy with small charities’ messages promoted on Big Screens and charities running their own events across the country.
How are we funded?

The FSI has a ‘mixed income’ economy. Securing funding from different sources is something we encourage all of our members to do and it is something we do ourselves.

We secure our voluntary income through the relationships we build with Trusts & Foundations and with major donors and corporate supporters, focusing our efforts on those sources of income that suit our cause and deliver a high return on investment.

We earn income to support the delivery of free support delivered to small charities across the UK, through a variety of sources. We deliver qualifications (Award, Certificate and Diploma) in Fundraising Practice. We work with Talent Teams in some of the UKs largest businesses to place ‘emerging talent’ onto the Trustee Boards of small charities. We also offer a paid for training membership to larger charities as we know that, whilst their incomes are more significant than the small charities we support, their training budgets remain small. We offer consultancy services to both small and large charities delivering bespoke support in strategy development, training across a wide range of subjects, fundraising strategies, governance, developing impact measurement models, support for capital appeals, business planning and much more.

All of our income from the above sources goes back into the charity to support our programme of free services to small charities.

If you are interested in supporting the FSI please get in touch and let us share with you how we can, and do, turn every £1 of income donated into £7.80 of free support to small charities.

THANK YOU to our supporters

Cabinet Office  Virgin Money Giving  Pothecary Witham Weld
The Santander Foundation  UK Charity Insurance  Charities Aid Foundation
The Leathersellers’ Company  Gallery Partnership  Smart Giving
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