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Definitions

- **Skills**: we have used definitions from the UK Commission for Funding and Skills: National Employer Skills Survey when defining skills.

- **Skills shortage vacancies**: are a subset of job vacancies where a role is hard to fill due to a lack of required basic or specialist skills, qualifications or experience in the applicants.

- **Skills gaps**: exist where employers report having employees who are not fully proficient at their job.

- **Small charities**: in the context of this survey a small charity refers to charities, community groups and other organisations working in the field of social change who deliver their services locally, regionally, nationally or internationally. We have surveyed charities with an annual turnover of less than £1.5 million.
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Skills gaps still present a major barrier for small local charities and community organisations across the UK, with more training still cited as a solution to the problem. However, one size will not fit all and so the challenge for umbrella support bodies, who provide training, is to flex their delivery models to meet the needs of small and local charities and community groups. We must offer a blended learning experience meeting the needs of those who live in well-connected urban centres to those who live and work in rural settings, to respond to the requirements of paid staff and the differing requirements of volunteers, and to those who prefer or require distance learning to those who seek face to face support.

Over the past ten years the FSI has provided face to face training through the provision of one day and half day training and conference places. The demand for this type of training has not diminished, indeed it has grown. However over the past 18 months we have been testing other methods of delivery, including short webinars tailored to be delivered as breakfast or lunchtime learning sessions and longer webinars, another addition to our learning experience, mirroring one and a half hour face to face workshops. These additions, along with short five minute video learning opportunities and an expansion of on-line toolkits, have added to our one day and half day training and conference places, which now provide small, local charities and community groups with a full blend of learning opportunities that meet the needs of a wider audience of learners.

The additions to our menu of learning experiences are a direct result of the findings in the FSI’s Skills Survey. We have adapted our offer to accommodate those charities that cited time issues, such as difficulty in taking time out of the office or away from service delivery, as a barrier to developing skills. This year’s respondents to our fourth biennial survey continued to call for increased training provision, not only for paid staff but also for volunteers. With 40% of respondents citing volunteers as one of the solutions to address skills gaps, it is increasingly important that training opportunities are opened up to volunteers. The increased demand for training can be viewed as a response to the unprecedented increase in demand for services, with small charities reporting an 81% increase from June 2013 to November 2016.

We are at the beginning of what will be one of the most eventful times in recent history as, for better or for worse, we set out to leave the EU. We must not be distracted, we must continue to focus on delivering the highest quality support to our beneficiaries, even at a time when many charities are being asked to take on an ever expanding role in the delivery of public services. If we are to meet these challenges and remain focussed on our beneficiaries, we need to ensure that both staff and volunteers are well equipped. When staff and volunteers are trained, supported and have access to advice, they are able to do their jobs well, they feel confident and that in itself improves the way they support their charity’s beneficiaries.

We hope that this survey continues to leverage and influence the government and other funders to support the development of skills across the sector. It is only with an informed and skilled workforce, both staff and volunteers, that charities will become self-sustaining. It is only with a vibrant, diverse and self-sustaining sector that civil society will truly meet the demands of the future.

Pauline Broomhead
Founding CEO of the FSI

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1 Foundation for Social Improvement (2017) Small Charity Index: Taking the Pulse of the Small Charity Sector, September to November 2016
Executive Summary

- Skills areas with the poorest performance ratings include engaging and working with businesses or companies (55%), strategic use of IT (49%) and impact reporting (48%).
- Skills areas which respondents rated strongly include team working (67%), basic computer literacy (56%) and leadership (62%).
- Fundraisers remain the most challenging vacancy to recruit for, according to 28% of small charities.
- Salary is the most commonly cited barrier to why vacancies are hard to fill, identified by 36% of respondents.
- In fundraising, major donor fundraising (67%), online fundraising (66%) and corporate fundraising (64%) were the top three categories in need of most upskilling by small charities.
- Leadership (23%) was selected as the area that most needed upskilling amongst trustees.
- 86% of small charities believe trustees ought to play an active role in fundraising, while only 51% actually do play an active role.
- Within financial management, 37% believed fundraising required the most development.
- Business planning (29%) was identified as the area requiring most upskilling by management specialists.
- Within the field of public policy, 47% indicated lobbying as requiring the greatest upskilling.
- Website development (37%) was selected as needing further upskilling the most within IT.
- Health and safety procedures was indicated by 20% of respondents as requiring further upskilling within Health and Safety.
- In marketing and communications, structuring communication plans and membership retention were both identified by 41% of respondents as needing upskilling.
- Securing resources (40%), such as sponsorship and income, was selected as the area requiring greatest up-skilling by respondents in project management roles.
- Lack of funding for training and development (61%) and lack of time available for employees to attend training (58%) were cited as the primary causes for skills gaps within their small charity.
- The main impacts of skills gaps identified were an increased workload for colleagues (59%), increased time to deliver work (46%) and decreased ability to take on new work (43%).
- The most common action believed to be the best solution, and also taken to address skills gaps, was further training provision (52%).
- Only 15% perceived using volunteers instead of paid employees as a solution, yet 40% took this as an action to address skills gaps.
- The most common reasons for not providing or participating in training were because external training is too expensive (73%), followed by difficulties in taking time out of the office (68%).
- The majority (69%) reported to have a formal business plan, but only 17% have an annual training plan linked to the business plan.
Introduction

The survey was first conducted with our members in 2010/11, and is conducted biennially. The 2016/17 survey represents the fourth edition in the series.

This survey identifies and explores key skills issues facing small charities, focusing on significant skills gaps and shortages and discusses approaches to dealing with them. The survey has been conducted by the FSI as part of our work to promote the skills, knowledge and sustainability of small charities.

Aims and Objectives

This is the fourth edition of our biennial Small Charity Sector Skills Survey which aims to explore and examine the nature and scope of skills shortages and gaps in the paid workforce in order to provide reliable measures to:

- Analyse skills gaps in the existing workforce
- Identify hard to fill vacancies and contributing factors
- Identify correlations and differences between current and earlier surveys
- Consider measures and approaches to deal with skills gaps

The findings of the survey are based on valid responses from individuals working in registered charitable organisations with an annual turnover of less than £1.5 million. The majority of the respondents were in leadership roles or governance positions within these organisations. However due to the limited workforce in many small charities, a greater number of respondents had multiple roles within their organisations. Accordingly the survey focused on specific skills utilised by individuals within the sector as opposed to specific job roles.

The survey highlights the need for skills development within the Small Charity Sector. It is intended to inform both the development of FSI services and be used to leverage and influence skills development in the sector as a whole.

Methodology

The research was conducted via an online survey which was designed to be consistent with the approach taken in the FSI’s four previous Small Charity Sector Skills Surveys in order to provide continuity in the results. The survey was distributed to the FSI’s member database of over 5,000 small charities. The survey generated 530 responses, 204 organisations were represented more than once, where employees from the same organisation completed the survey, these were removed and left a sample size of 326.
Responding Charities by Annual Turnover

All of the responding small charities in this study have an annual turnover of less than £1.5 million. Significantly, over half of respondents (52%) represented charities with an annual turnover of £250,000 or less. This reflects results of previous surveys (2010/11, 2012/13 and 2014/15), however the percentage has decreased from 67% in 2010/11 to 52% in 2016/17.

Responding Charities by Cause Type

The charities featured in this survey represent a wide range of cause types. The three most commonly represented charities are Health (22%), Children and Young People (22%) and Community Welfare, Advocacy and Rights (18%).

When asked further about their beneficiaries, more than half of respondents (51%) selected children and young people, the next most common was the elderly, selected by just over a fifth (22%) of respondents.

Responding Charities by Location

Respondents were asked where they deliver their support. 45% of respondents said their charity delivers support locally (an increase of 2% from 2014/15), 24% nationally, 17% internationally and 14% regionally.
Skills Ratings

Skills areas with strong performance ratings are where 50% or more respondents rated it to be excellent or very good, and skills with poor performance ratings are where 40% or more respondents rated skills areas to need some upskilling or significant upskilling.

Strong Performance Ratings

Team working continues to be an area that small charities report as excellent or very good (68%). Other areas include basic computer literacy or IT (67%), leadership (62%), working in partnership with other organisations (56%) and management of paid staff (56%). These areas were rated similarly in the 2014/15 report, nevertheless the percentage of excellent or very good responses has increased, with the exception of health and safety which decreased from 56% to 52%.

Skills with strong performance ratings

<table>
<thead>
<tr>
<th>Skill</th>
<th>Strong Performance Ratings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management of paid staff</td>
<td>Excellent</td>
</tr>
<tr>
<td>Project management</td>
<td>Very good</td>
</tr>
<tr>
<td>Finance</td>
<td>Excellent</td>
</tr>
<tr>
<td>Team working</td>
<td>Excellent</td>
</tr>
<tr>
<td>Basic computer literacy/IT</td>
<td>Excellent</td>
</tr>
<tr>
<td>Leadership</td>
<td>Excellent</td>
</tr>
<tr>
<td>Working in partnership with other organisations</td>
<td>Excellent</td>
</tr>
</tbody>
</table>
Poor Performance Ratings

Skills areas with the poorest ratings, where small charities indicated the greatest need for significant or some upskilling, include: engaging and working with businesses or companies (55%), strategic use of IT (49%) and impact reporting (48%). However, in comparison to the last report, small charities are beginning to feel more confident in these skills areas, where the percentage of requiring upskilling has decreased slightly. For instance, engaging and working with businesses or companies decreased from 57% in 2014/15 to 55%, and similarly, strategic use of IT fell from 52% to 49%.

Skills by Annual Turnover

It is unsurprising that our research finds a difference in the need for skills development between charities with smaller and larger annual turnovers.

Overall, charities with larger turnovers had stronger skills ratings than those with smaller turnovers. However, from the table below, we can see that skills gaps identify themselves as charities develop and grow. As charities grow and employ greater numbers of paid staff, they require greater upskilling in areas of management. For instance, 23% of charities with a turnover between £1m - £1.5m indicated a need for further upskilling in management of paid staff, while only 8% of charities with a turnover of £151,000 - £250,000 identified the same need.
The smaller charities, with incomes under £150,000 per annum reported the largest need for upskilling across skill areas. There was an acute difference in engaging and working with business or corporates: 62% of smaller charities with a turnover of less than £150,000 required upskilling in this area, compared to only 28% of charities with a turnover between £1 million - £1.5 million indicating the same need. All charities, with the exception of those with an annual turnover of over £1 million, required some level of upskilling in impact measurement and monitoring and evaluation.

<table>
<thead>
<tr>
<th></th>
<th>Fundraising</th>
<th>Engaging with businesses</th>
<th>Monitoring and Evaluation</th>
<th>Impact Reporting</th>
<th>Management of paid staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>£0 - £150k</td>
<td>53%</td>
<td>62%</td>
<td>44%</td>
<td>50%</td>
<td>15%</td>
</tr>
<tr>
<td>£151k - £250k</td>
<td>35%</td>
<td>55%</td>
<td>45%</td>
<td>41%</td>
<td>8%</td>
</tr>
<tr>
<td>£252k - £500k</td>
<td>44%</td>
<td>56%</td>
<td>46%</td>
<td>51%</td>
<td>20%</td>
</tr>
<tr>
<td>£501k - £1m</td>
<td>36%</td>
<td>50%</td>
<td>45%</td>
<td>56%</td>
<td>20%</td>
</tr>
<tr>
<td>£1m - £1.5m</td>
<td>19%</td>
<td>28%</td>
<td>19%</td>
<td>27%</td>
<td>23%</td>
</tr>
<tr>
<td>Difference between £0 - £150k and £1m - £1.5m</td>
<td>34%</td>
<td>34%</td>
<td>25%</td>
<td>24%</td>
<td>-8%</td>
</tr>
</tbody>
</table>

Note: figures in orange represent the greatest need for upskilling while figures in green represent the least need for upskilling. Therefore the difference calculated is not always the difference between the largest and smallest proportions.

Skills gaps in fundraising appear to be most pronounced in charities with a lower annual turnover. 53% of small charities with an income of less than £150,000 recognised a need for upskilling in fundraising, while only 19% of charities with a turnover between £1 million - £1.5 million indicated the same need.
Recruitment Problems

Vacancies

Fundraisers continue to be the most challenging vacancy to recruit for, selected by 28% of small charities. However, compared to previous survey results, the percentage of organisations identifying fundraising vacancies as difficult to fill has continued to fall; from 57% in 2012/13 and 32% in 2014/15. This continued fall could be attributed to the rise in the number of affordable fundraising training opportunities through organisations like the FSI and Small Charities Coalition, and to the investment made in the Small Charities Training Programme by the government.

Whilst volunteering levels in the UK remain stable, filling the position of Volunteer Manager remains the second most difficult position to fill (9%).

Which vacancies do you find hardest to fill?

- Fundraisers: 28%
- Volunteer managers: 9%
- CEO/Director: 8%
- Youth workers and social carers: 8%
- Project management staff: 7%
- Marketing/communications staff: 6%
- Administrators: 5%
- Heads of departments/function heads: 5%
- Finance staff: 5%
- HR/Personnel staff: 4%
- Business Development: 4%
- IT support: 3%
- Information/Research/Policy staff: 3%
- Development workers: 3%
- Advice workers/counsellors: 3%

Base no. = 316

---

When asked how easy it is to get suitable staff with the best skills, only 3% of small charities found it very difficult, a small decrease by 1% from the 2014/15 survey. Respondents reporting it somewhat difficult dropped to 28%, a 3% decrease from 2014/15 (31%). The majority of respondents (41%) found it somewhat easy, depending on the role recruited for.

Barriers

The barriers faced appear to be similar to those observed in previous surveys. Salary is the most commonly cited reason and has remained relatively static at 35%, similar to 2014/15. Applicants’ lack of skills would also appear to be barriers to recruitment, with a lack of specialist skills (33%) and a lack of experience (24%) taking second and fourth positions. Few or no applicants (25%) was cited as the third most common barrier to recruitment.

The problem of not having enough funds to advertise widely has fallen, from second place with 31% in 2014/15 to fifth place with 22% in 2016/17.

“As a small charity we pay salaries towards the lower end of market expectation, so getting the skills, matched with experience/qualifications in an outer London Borough is challenging.”
Reasons for hard to fill vacancies

- Salary: 35%
- Applicants’ lack of specialist skills: 33%
- Few or no applicants: 25%
- Applicants’ lack of experience: 24%
- Not enough funds to advertise widely or in best places: 22%
- Job only temporary or offered on short term contracts: 21%
- Competition from other organisations: 10%
- Not applicable: 8%
- Applicants’ lack of basic skills: 5%
- Applicants’ lack of qualifications: 4%
- Terms and conditions: 4%
- Other: 8%

Base no. = 284
Key Skills Issues

The survey asked respondents to rate skill levels in a range of competencies to allow us to look at the particular skill development needs within specific job roles.

Governance

Leadership was selected as the area where small charities felt the greatest need for upskilling amongst trustees, with 23% selecting either significant or some upskilling required.

Whilst results are similar to those observed in previous years in trustee governance and leadership, we have seen a marked increase in the number of respondents indicating that their trustee board were either very good or excellent in formal board management, up to 57% in 2016/17 from 50% in 2014/15.

“I think trustees would benefit from understanding how they can help the charity above and beyond governance (i.e. reaching out to people in their network, approaching corporates for support, helping to create a long-term vision for the organisation and to see their part in that vision), how they can take on a more active role, truly understanding the needs of the organisation.”

The survey asked small charities what part their trustees played in fundraising and found a persisting difference between the expectation of the role of trustees and their role in practice: 86% believed trustees ought to play an active role in fundraising while only 51% of trustees do have an active role.
Financial Management

For respondents overseeing the financial management of their organisation, 37% believed fundraising was the area that required the most development, with only 35% reporting either very good (30%) or excellent (5%). The next most cited area for development was budgeting (25%).

Management

Business planning (29%) was identified as the area most requiring further development, an increase from 27% in 2014/15. People management (66%), team building and motivation (57%), managing a diverse workforce (54%) and skills in effective supervision and appraisal (53%) remained strong skill areas.
Public Policy

Within the field of public policy, nearly half of respondents (47%) indicated upskilling was required in the area of lobbying.

HR

Over a third (35%) of respondents with responsibility for HR in their small charity indicated that they required upskilling in the latest HR laws and practices. This has increased from 27% in 2014/15.
IT

Of those responsible for IT in their organisation, 37% felt the greatest need for upskilling was in website development. This replaces utilising social media, which in 2014/15, 45% of respondents cited as a key area which required either some or significant upskilling, while in the current survey this has dropped to just over a third (35%).

More than two thirds of respondents (69%) felt confident in their basic IT skills, compared to only 30% of respondents who were confident in specialist IT skills.

“In an ever changing environment keeping abreast of latest updates of both hardware and software and ensuring IT requirements meet the needs of the charity within the budget available is challenging”

Health and Safety

Health and safety procedures and policies was indicated by 20% of respondents as an area requiring further upskilling in this area.
Marketing and Communications

Both structuring communication plans and membership or supporter retention were identified by 41% of respondents as needing the greatest upskilling in their small charity.

“Our main issue is that we have one person working 18 hours per week trying to cover all areas. For the past 10 years or so we haven’t had the resources to invest in training and development. Consequently our Marketing manager has struggled to get our message out there and hasn’t had time to be strategic.”

Fundraising Project Management

Of those with responsibility for project management in their small charity, respondents felt confident in their skills. However, securing resources, such as sponsorship and income, was overwhelmingly identified as the area needing the greatest upskilling by 40% of respondents.
Fundraising

In line with the past Skills Surveys, major donor fundraising (67%), online fundraising (66%) and corporate fundraising (64%) were the three categories in need of most upskilling by small charities.

“The organisation is completely dependent on me in terms of fundraising so it’s risky to not have anyone else doing fundraising or a trustee who supports this area of work. I have good skills in terms of lottery and trusts fundraising and an annual online fundraising event, but we are not confident to ask many people to donate to our work.”
Causes of Perceived Skills Gaps

The ability for small charities to address the skills gaps within their organisations is restricted by several factors. Lack of funding for training and development (61%) and lack of time available for employees to attend training (58%) has consistently been cited as the biggest causes for skills gaps within small charities. A lack of locally available training was identified by 21%, which is down from 23% in 2014/15.

“As a small organisation with few paid staff (total of 1.5 FTE) it is very hard to undertake training and develop policies whilst also keeping everything running. There is a historical lack of internal policies or procedures, which, although we are addressing, is very challenging to do.”

“Due to being a small organisation run solely by volunteers, enabling board members to access free education is difficult and then finding suitable opportunities that don’t conflict with their normal work is tricky.”

“We are a relatively small organisation with a small team of staff trying to keep on top of everything. There is a recognition, however, that training is important and should be undertaken where relevant and cost effective.”
Impact of Skills Gaps

Skills gaps within small charities have a direct impact on the workforce. The main impact of skills gaps identified by respondents was an increased workload for colleagues (59%), followed by increased time to deliver work (46%) and a decreased ability to take on new work (43%).

In a sector where innovation and the ability to flex to the needs of beneficiaries is important, it is worrying that an impact of skills gaps has resulted in no room for the development of services (37%).

“We know there are loads of ways to increase people’s skills but we have no money and staff are all overstretched already with workload. Staff are trying to do many different roles.”
The most common action for a small charity to take to address existing skills gaps was further training provision (52%), followed by utilising resources and training from voluntary sector umbrella and other infrastructure bodies (42%), and using volunteers instead of paid employees (40%). Using volunteers had previously been the most common action taken but has steadily decreased as small charities look elsewhere for resources.

In contrast to 2014/15, when respondents were asked what actions they believed to be the most effective solution to addressing skills gaps, further training provision was ranked first (58%) instead of second, and visits to other organisations delivering similar activities became the second most popular solution at (44%) instead of first. Other popular solutions included learning from other organisations in terms of mentoring (40%) and connecting with a business and using their skills and experience (33%). The most common reasons for not providing or participating in training were due to cost – external training is too expensive (73%), followed by time issues – difficult to take time out of the office (68%).
The majority of small charities (69%) reported to have a formal business plan, yet only 17% have an annual training plan linked to a business plan, a huge decrease from 72% in 2014/15. Nevertheless, over half (52%) have a training budget and 38% formally assess their organisational skills gaps.

"We previously had a training budget and a training and development plan which lapsed. The organisation is now working to rebuild these to help us move forward."

The most pronounced difference between actions taken versus perceived was using volunteers instead of paid employees: 15% perceived it to be a solution while 40% took this as an action to address skills gaps. Connecting with a business and using their skills and experience was perceived as a solution by a third of small charities, yet this was only taken up by 12% of respondents.

"As a small charity with only the financial resources to employ one paid member of staff, we have to deliver our work using volunteers. The key challenge for us is how to market our requirements to volunteers, knowing that not getting paid for that work will probably be a key sticking point for many people. Many volunteers have time issues, with many like myself only able to work in the evenings after our full time job, how do we make volunteer roles “attractive”?

"As we are a small staff team on restricted hours due to funding, we can only access training opportunities one at a time, which makes sourcing the right opportunities for all very difficult."

"We previously had a training budget and a training and development plan which lapsed. The organisation is now working to rebuild these to help us move forward."
Recommendations

Small, local charities and community groups are vital in the delivery of local, regional, national and international services. They support those most in need and so must be supported themselves to continue to carry out the services they deliver. Both government and other public funders must ensure that they not only support the delivery of direct services, but also take steps to capacity build a strong civil society, part of which must be the development of skills across the sector.

1. Government and other public funders to take the lead by demonstrating long-term commitment to affordable skills development and capacity building across the small charity sector.

Smaller charities are best placed to support those facing multiple disadvantages and as evidence shows more and more people are turning to them for support\(^3\). Recognition by government and other public funders that a long-term commitment to skills development and capacity building is vital to ensure that smaller charities are there for those in need today and in the future.

2. Umbrella support bodies to invest in delivering high quality and easily accessible learning opportunities that are tailored to a diverse audience of learners.

Smaller charities are heavily reliant on part-time staff and volunteers, and the use of volunteers to deliver direct service provision, as well as fundraising and administrative support, is well established. Training opportunities must be tailored to meet the needs of those who work and support smaller organisations.

3. Trustees of smaller charities to understand the benefit and make a commitment to funding the development of skills within their organisations for both staff and volunteers.

Trustees to ensure that skills gaps within the organisation are identified and that they have an annual training plan, with an associated budget, that is linked to the business development plan for the organisation.

4. Trustees and senior staff of smaller charities to actively seek out opportunities to collaborate with one another, and by so doing will contribute to ensuring their long-term sustainability.

At a time when smaller charities are facing increased workloads, when one in ten charities admit they are struggling to stay afloat and that closure is a very real outlook without significant change\(^4\), the leaders in smaller charities must take the lead to proactively seek out collaborations that are meaningful and beneficial to their beneficiary group.

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\(^3\) Foundation for Social Improvement (2017) Small Charity Index: Taking the Pulse of the Small Charity Sector, September to November 2016

\(^4\) Ibid.
FSI Consultancy Services

The Foundation for Social Improvement (FSI) are here to help support your charity’s effectiveness and sustainability. We have over 75 years of collective experience in delivering tailored high quality support as experts in charity strategy, governance, income generation, impact measurement and improving impact reporting.

Strategy and Business Planning
The FSI team has a wealth of experience in working with charities to plan and facilitate strategy away days, develop trustee strategies and support annual business planning activities. Specific projects we can help with are:

- Facilitated Strategy Planning Day
- Developing Strategy Document
- Developing Business Plans

Impact Reporting and Evaluation + Impact Measurement
The FSI work with charities, funders and public sector bodies to enable them to better understand the value and effectiveness of what they do and communicate this to key audiences. We offer support with:

Impact Reporting and Evaluation
- Project Evaluation
- Annual Impact Report
- Social Return on Investment Analysis

Impact Measurement
- Impact Measurement Review
- Theory of Change Development
- Impact Measurement Framework

Fundraising and Income Generation
Robust, sustainable fundraising strategies will ensure your charity is focussing its efforts in the areas that will deliver the greatest return in the short and long term. We work with charities to undertake:

- Fundraising Reviews
- Develop Fundraising Strategies

We tailor each request for support to exactly what your organisation needs. For more information on how we can help your charity to thrive, contact:

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T: 020 73244 777
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